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Tourism & Film Marketing Plan 1992-1993

Montana

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Tourism & Film Marketing Plan

1992-1993

Montana

Travel Montana
Montana Department of Commerce
1424 9th Avenue
Helena, Montana 59620
(406) 444-2654

Foreword

As Montana continues to set new records for the number of out-of-state visitors and the amount of money they spend each year, the importance of tourism to the Montana economy continues to grow. Without a doubt, the travel industry continues to be one of the bright spots of the Montana economy.

Many share the credit for this success. The partnerships between the private sector and state government have worked exceptionally well to create effective promotional programs. With leadership and guidance from the Tourism Advisory Council, the word about Montana's remarkable vacation opportunities is being heard throughout the United States, Canada and as far away as Europe and the Pacific Rim.

As we move through the 90s, I am confident the state's efforts will continue to be successful as a result of our unique partnership and working relationship with the private sector of Montana's travel industry.

Governor Stan Stephens

As Montana's fastest growing industry, tourism has become an integral part of Montana's economic base. At a time when many of Montana's natural resource-based industries continue to be subject to the economic roller coaster of boom or bust, tourism has charted a stable path of continued growth.

While clearly not a panacea for all of Montana's economic woes, tourism does represent a clean non-extractive resource-based industry that is consistent with the best of what Montana has to offer. The growth of tourism in Montana represents an important step in balancing and diversifying Montana's economic base, and must continue to be recognized and managed with that goal in mind.

Charles A. Brooke, Director
Department of Commerce

Introduction

This document outlines the strategies and efforts of Travel Montana, Department of Commerce, for the period of July 1992 through June 1993.

Travel Montana's mission is to strengthen Montana's economy through increased nonresident travel and the filming of motion pictures and commercials in Montana. While several factors affect Montana's position in these highly competitive fields, a well focused marketing effort is certainly one of the most significant.

Our efforts for the year ahead have been designed to generate increased visitation during the fall and winter, while maintaining high visitation levels during the summer months. Recommendations arising from the long-range Tourism Strategic Plan, scheduled for completion in September of 1992, will be incorporated in the implementation of this plan.

This plan was developed in close cooperation with the Governor's Tourism Advisory Council, whose guidance added the critical business perspective to our strategies.

Nonresident travel to Montana means over $1.8 billion in economic activity for the state each year, supporting 29,300 jobs and generating roughly $84 million in tax revenues at the state and local levels. With annual growth that far outpaces the national growth rate, the Montana tourism industry has much to be pleased about, and yet we are far from reaching our full tourism potential. I am confident that the contents of this economic development plan are another important step in the right direction.

Sandra Guedes
Director of Tourism

Tourism Advisory Council Overview

The Montana Tourism Advisory Council (TAC) was created by statute in July of 1987, as a result of the inception of the Montana lodging tax. The Council is composed of no less than 12 members from Montana's private-sector travel industry, with representation including each of Montana's six tourism regions. Members of the Council are appointed by the Governor and serve staggered 3-year terms, subject to replacement at the discretion of the Governor.

A chairperson and a vice-chairperson are elected (or reelected) by the Council during the first meeting of each fiscal year, which starts on July 1. Members must have served on the Council for at least one year in order to be eligible for election to these posts. The Council usually meets on a quarterly basis and/or as needed.

The duties of the Council are as follows:

- Advise the Governor on matters which relate to travel and tourism in Montana.
- Set policies and guide the efforts of Travel Montana, Department of Commerce.
- Oversee distribution of funds and set guidelines for nonprofit regional tourism corporations and nonprofit convention and visitors bureaus.
- Prescribe allowable administrative expenses for which accommodation tax proceeds may be used by nonprofit regional tourism corporations and nonprofit convention and visitors bureaus.
- Direct the university system's travel research and approve all projects prior to their being undertaken.

Tourism Advisory Council Members

Ken Hickel, Chair (95)
Best Western Ponderosa Inn
P.O. Box 1791
Billings, MT 59101
259-5511
245-8004 (FAX)

Henry Gehl, Vice Chair (94)
Park Inn
211 East Main
Lewistown, MT 59457
538-8721
538-8969 (FAX)

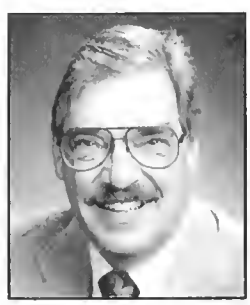
Terry Abelin (94)
Bridger Bowl Ski Area
15795 Bridger Canyon Rd.
Bozeman, MT 59715
587-2111
587-2111 (FAX)

Maureen Averill (95)
Flathead Lake Lodge
P.O. Box 248
Bigfork, MT 59911
837-4391
837-6977 (FAX)

Diane Brandt (95)
Sam's Supper Club
307 Klein Avenue
Glasgow, MT 59230
228-4614

Arnold "Smoke" Elser (93)
Wilderness Outfitters
3800 Rattlesnake Drive
Missoula, MT 59802
549-2820

Ken Hoovestol (93)
Century 21
3015 10th Avenue South
Great Falls, MT 59405
761-2811



Tom Johnson (93)
Village Red Lion Inn
100 Madison
Missoula, MT 59802
728-3100
728-2530 (FAX)

Dick Krott (93)
Reeder's Alley
P.O. Box 572
Helena, MT 59624
449-7545

Herb Leuprecht (94)
Best Western Butte Plaza Inn
2900 Harrison Avenue
Butte, MT 59701
494-3500
494-7611 (FAX)

Edythe McCleary (95)
Custer Country
Route 1, Box 1206A
Hardin, MT 59034
665-1671
665-1671 (FAX)

Larry McRae (93)
Best Western Outlaw Inn
1701 Highway 93 South
Kalispell, MT 59901
755-6100
756-8994 (FAX)

Barbara Moe (94)
Anderson-Elerding Travel
P.O. Box 2185
Great Falls, MT 59403
761-0700
727-4221 (FAX)

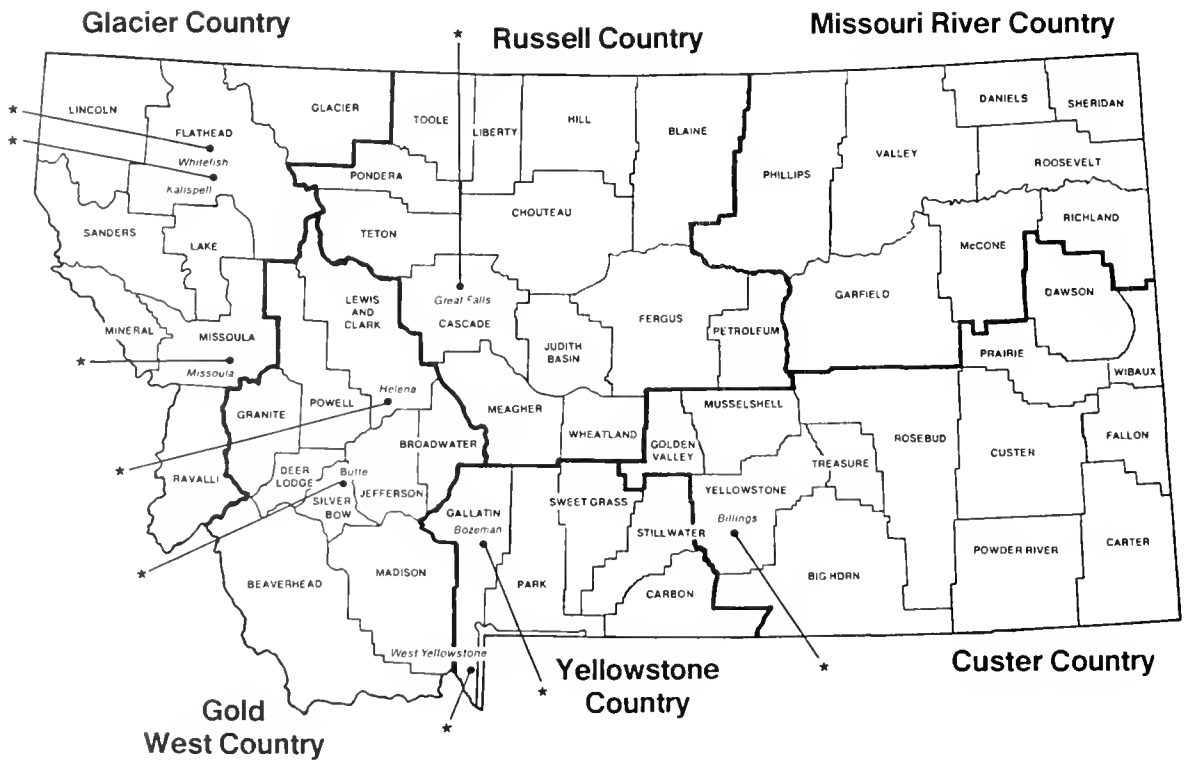
Art Peterson (94)
KOA, Inc.
P.O. Box 30558
Billings, MT 59114
248-7444
248-7414 (FAX)

Velda Shelby (94)
Confederated
Salish and Kootenai Tribes
P.O. Box 278
Pablo, MT 59855
675-2700 • 675-2806 (FAX)

* ***Numbers to the right of each name indicate the year in which the term expires on July 1.***

Certified Tourism Organizations

Twenty-five percent of Montana's state tourism budget is legislatively allocated to fifteen certified organizations. These organizations are private, nonprofit corporations that market specific regions and cities within the state. Under the direction and guidance of the Tourism Advisory Council, these organizations submit annual marketing plans which seek to both increase visitation and visitors' length of stay. Marketing plans for each of the tourism organizations are on file at Travel Montana.



- Convention and Visitors Bureaus

— Bold Lines Denote Tourism Regions

Tourism Regions

Custer Country

Gail Price, President
P.O. Box 1625
Miles City, MT 59301
232-4995

Edythe McCleary, Exec. Dir.
Route 1, Box 1206A
Hardin, MT 59034
665-1671 • 665-1671 (FAX)

Glacier Country

Randy Gayner, President
P.O. Box 535
West Glacier, MT 59936
888-5333 (summer)
862-4802 (winter)
862-1467 (FAX)

Joan Gentri, Exec. Dir.
945 4th Ave. E., Suite B
Kalispell, MT 59901
756-7128 • 756-1575 (FAX)

Gold West Country

John Claypool, President
P.O. Box 988
Ennis, MT 59729
682-4933 • 682-7417 (FAX)

Gail Jones
1155 Main Street
Deer Lodge, MT 59722
846-1943 • 846-1373 (FAX)

Missouri River Country

Jeanne French, President
101 Hawkeye
Plentywood, MT 59254
765-1164 • 765-1164 (FAX)

Shirley Legg, Secretary
P.O. Box 1064
Malta, MT 59538
654-2234

Russell Country

George Willett, President
P.O. Box 92
Neihart, MT 59465
236-5522 • 236-5523 (FAX)

Gayle Fisher
P.O. Box 3166
Great Falls, MT 59403
761-5036 • 761-6129 (FAX)

Yellowstone Country

Terry Abelin, President
15795 Bridger Canyon Road
Bozeman, MT 59715
587-2111 • 587-2111 (FAX)

Gail Montgomery, Secretary
P.O. Box 810
Gardiner, MT 59030
848-7474

Ms. Lou Snodgrass, Treasurer
P.O. Box 670
Big Timber, MT 59011
932-5242

Convention & Visitors Bureaus

Billings

Nancy Ugrin-Bond, CVC Director
P.O. Box 31177
Billings, MT 59107
245-4111 • 245-7333 (FAX)

E. "Butch" Ott, Chamber President
P.O. Box 31177
Billings, MT 59107
245-4111 • 245-7333 (FAX)

Bozeman

Polly Stebbins, CVB Coordinator
P.O. Box B
Bozeman, MT 59715
586-5421 • 586-8286 (FAX)

Darla Joyner, Chamber Exec. V.P.
P.O. Box B
Bozeman, MT 59715
586-5421 • 586-8286 (FAX)

Butte/Silver Bow

Ms. Eddie Steward, Admin. Asst.
2950 Harrison Avenue
Butte, MT 59701
494-5595 • 494-5188 (FAX)

Connie Kenney, Chamber Exec. V.P.
2950 Harrison Avenue
Butte, MT 59701
494-5595 • 494-5188 (FAX)

Great Falls

Mike Labriola, CVB Exec. V.P.
P.O. Box 2127
Great Falls, MT 59403
761-4434 • 761-6129 (FAX)

Dennis Anderson, Chamber President
P.O. Box 2127
Great Falls, MT 59403
761-4434 • 761-6129 (FAX)

Helena

Ms. Blair Lund, CVB Manager
201 East Lyndale
Helena, MT 59601
442-4121

David Hemion, Chamber Exec. Dir.
201 East Lyndale
Helena, MT 59601
442-4121

Kalispell

Bill Martin, CVA Director
Flathead CVA
15 Depot Loop
Kalispell, MT 59901
756-9091 • 752-7161 (FAX)

Nick Haren, Chamber Exec. Dir.
15 Depot Loop
Kalispell, MT 59901
752-6166 • 752-7161 (FAX)

Missoula

Pamela Hoedel, CVB Director
P.O. Box 7577
Missoula, MT 59807
543-6623 • 543-6625 (FAX)

David Owen, Chamber Exec. V.P.
P.O. Box 7577
Missoula, MT 59807
543-6623 • 543-6625 (FAX)

West Yellowstone

Viki Eggers, CVB Exec. Dir.
P.O. Box 458
West Yellowstone, MT 59758
646-7701

Pete Donau, Chamber President
P.O. Box 458
West Yellowstone, MT 59758
646-7701

Whitefish

JoAnn Cate, Chamber Exec. Dir.
P.O. Box 1120
Whitefish, MT 59937
862-3501

Tourism Funding

Montana's tourism promotion efforts are funded solely by the Montana lodging tax, which is a 4% tax on rates of hotels, motels, campgrounds, resorts and other lodging facilities.

Projected Lodging Tax Revenues FY '93 ..... $6,738,996

Department of Revenue
(Tax Collection & return of tax paid by state employees) ... $202,169

University System - 2.5%
(Tourism & Recreation Research)..... .$168,475

Historical Society - 1%
(Historical Sites and Signage)..... ..$67,390

Department of Commerce
(Regions/CVBs and Travel Montana)..... ..$6,300,962

Department of Commerce
Projected FY '93 Budget

Regions/CVBs (25%)	$1,925,241
Travel Montana (75%)	$4,825,722
Total.....	$6,750,963

Travel Montana Overview

Saudra Guedes
Director of Tourism

Sandra leads the promotional efforts of the State of Montana in the areas of tourism and the film industry. She directs the planning, marketing, operations and industry support activities of Travel Montana and ensures that the tourism perspective is considered in matters of policy at the state level. Travel Montana is divided into four main areas, encompassing a total of ten distinct programs, as outlined in the organizational chart on page 15. In the design and implementation of Travel Montana's mission, Sandra works on a regular basis with state and national organizations, other public agencies, the State Legislature, U.S. Congressional members, local governments and the press.

Administration

Debbie Hanna
Administrative Officer

Providing direct support to the Travel Director, Debbie assists with coordinating Travel Montana's many activities and ensures the smooth flow of information. During the Director's absence, she expedites all contacts and correspondence from members of the public, tourism industry and other government agencies. Debbie serves as liaison with staff on special projects, and is responsible for personnel matters, private sector contracts, the research library and presentation material. She handles varied special projects, compiles travel data, and responds to information requests.

Becky Thomas
Administrative Assistant

Providing administrative support for staff members, Becky performs diverse duties from research and data collection to assistance with publication layout and design. She maintains accommodations tax revenue reports and records on financial and program compliance by tourism organizations. Becky is also responsible for a variety of mailings to the members of Montana's tourism industry, keeping them informed of events, co-op programs and the activities of Travel Montana. She schedules Travel Montana's booth and banners for exhibiting, and assists in the development of seminars, workshops and conferences.

Consumer Marketing

Nancy Korizek
Consumer Marketing Manager

Each season presents new challenges and opportunities for Nancy, who oversees Travel Montana's domestic and Canadian consumer advertising. She is involved in developing plans and budgets for spring/summer, fall and winter marketing, instate Invite-A-Friend programs and coordinates seasonal campaigns to fulfill those plans within budget. Nancy is also responsible for determining the effectiveness of Travel Montana's advertising campaigns, and makes recommendations for change based on market results. Her job includes presenting campaigns to the Tourism Advisory Council and organizing cooperative advertising with other states, visitors bureaus and private sector organizations.

Overseas Marketing

Pam Gosink
Overseas Marketing Manager

Creating a demand for what Montana has to offer is a primary goal of Pam's activities in Japan, Taiwan, the United Kingdom and Germany. She encourages overseas tour decision makers to include Montana in their programs, and assists in planning and operating groups and FIT(individual) travel in Montana. Persuading key travel trade representatives and the news media to take familiarization trips to experience Montana tourism opportunities firsthand is also an important part of her job. Trade shows she attends and trade missions she organizes help Montana suppliers meet potential overseas buyers and create new avenues for media contact. In her marketing efforts, Pam also develops and distributes promotional materials in several foreign languages, and develops innovative promotional opportunities.

Group Travel/Conventions

MaryEtta Sodja
Group Travel Coordinator

Marketing Montana to group tour operators and convention planners has MaryEtta planning itineraries, providing travel counseling, attending targeted trade shows and performing other duties to encourage groups to visit Montana and stay longer. MaryEtta develops and distributes the state's Group Tour Planning Guide and manages regular mailings of Montana Magazine and a Montana calendar to key tour operators. Her work also includes organizing familiarization trips for group tour operators and downhill skiing tours for travel agents. MaryEtta is also responsible for the development and implementation of Montana's convention promotion, including a direct mail campaign, Meeting Planner's Guide and the Invite-A-Convention program.

Publications

Donnie Sexton
Publications Manager

Directing production of Travel Montana's numerous publications has Donnie gathering facts, writing, editing, selecting photos, scheduling and much more. She is responsible for the Montana Winter Guide, Snowmobiling Guide, Vacation Guide, Highway Map, Lodging Guide, Recreation Guide and Summer and Winter Calendars. She developed the state's first Angling Guide and Golfing Guide, and coordinates production of the Movie Location Guide, Group Tour Guide, Meeting Planner's Guide and other printed material such as business cards, letterhead and newsletters. Working with a publishing company, Donnie directs creative design; oversees layout, proofing, and printing; makes photo selections; and negotiates rights with photographers.

Publicity

Carla Hall
Publicity Coordinator

Soliciting news coverage of Montana and responding to journalists interested in covering Montana as a tourism destination are central to Carla's many responsibilities. Along with supplying stories for publication, distributing a quarterly newsletter and releasing ideas for potential feature articles, Carla serves as a resource for writers, news media and others. She works closely with the state's tourism regions in developing story ideas, gathering information and assisting writers who visit the state. Carla also coordinates writer familiarization trips and handles instate media relations for Travel Montana.

Tourism Development

Clint Blackwood
Tourism Development Coordinator

Working to assure internal support for tourism in Montana, Clint interacts with various state, federal agencies and private-sector issues related to tourism infrastructure development. He coordinates and facilitates cooperative marketing efforts between organizations as diverse as the Department of Fish, Wildlife & Parks, U.S. Forest Service and Department of Transportation. As Tourism Development Coordinator, Clint is involved in long-range strategic planning, tourism assessment, interagency and public relations negotiations on behalf of Travel Montana.

Film Office

Lonie Stimac
Film Location Manager

Promoting Montana as an ideal place to make a movie or shoot a commercial is the job of the Film Office under Lonie's direction. She manages the office budget, personnel matters, and is responsible for location scouting with film companies making it as convenient as possible for them to shoot in the state. She assures that the Film Office staff is available to assist or make local contacts once filming begins, and also works with Montana businesses and individuals to foster a productive working relationship with film crews. Lonie acts as Travel Montana's liaison with other state and federal agencies regarding the needs of production companies. As a marketer, she attends trade shows and film festivals and oversees advertising targeted to the film industry.

Bill Kuney
Film Location Coordinator

Responding to the needs of film production companies interested in Montana, Bill scouts the state, shoots hundreds of location photos and compiles location information. He works to offer several options to fit the storyboards or scripts of people seeking locations for feature films, documentaries, commercials and print ads. Bill assembles customized photo presentations using the Film Office's extensive file of location photos — a file he continually restocks with new photos. His work includes traveling with film location managers or directors scouting the state, contacting local people for assistance and facilitating during filming.

Maribeth Goodrich
Location Assistant

Working to enhance the resources available to production companies filming in the state, Maribeth performs a broad range of administrative assistance and related duties. She acts as a liaison between Montana film crew members and the Film Office regarding movie projects in the state, responds to requests from out-of-state companies interested in filming in Montana and prepares presentations to meet their needs. Maribeth maintains the photography and crew member files and organizes press clippings, statistics and other information for the Film Office files. In addition, Maribeth uses the Macintosh computer to prepare crew and production services lists, flyers, charts and other materials.

Industry Services & Operations

Gail Brockbank
Industry Services Manager

No two days are alike as Gail oversees the distribution of more than $1.5 million in accommodation tax revenues to Montana's 15 tourism regions and cities. As Industry Services Manager, she serves as liaison between certified tourism organizations and the Montana Tourism Advisory Council. Gail assists these organizations in applying for project funding, performs financial audits, assures program compliance and explains program administration to the private sector. She also supervises the Superhost program, the consumer exhibiting program, the fulfillment program, coordinates the annual Governor's Conference on Tourism and Recreation and produces Travel Montana's quarterly newsletter – Montana Travel Update.

David Broussard
Operations Manager

To ensure the most effective control of Travel Montana funds, David performs a wide range of budgeting, accounting and purchasing duties. David oversees the processing and documentation of all expenditures, purchase orders and income to assure accuracy and compliance with state rules and Travel Montana policies. He prepares cost estimates and performs financial evaluations with an eye toward reducing cost and increasing effectiveness. A key part of David's job is managing Travel Montana's extensive telemarketing activities. Each year he assures that hundreds of thousands of consumer requests are handled well, and that literature packets are mailed in a timely manner.

Shawn Peterson
Industry Services Coordinator

Getting the private sector involved in building tourism is the goal behind the Superhost program, a customer service training program managed by the Industry Services Coordinator. Through the program, employees at motels/hotels, campgrounds, restaurants, gas stations, retail stores, chambers and a host of others learn how to increase state visitors' length of stay and encourage their return. Shawn directs the development and implementation of contracts with fifteen professional Superhost customer service trainers. These contractors are located throughout the state and are responsible for providing front-line customer service training. Shawn also provides administrative support for the annual travel conference, auditing of tourism organizations receiving accommodation tax revenue, newsletter production and other activities of Travel Montana.

Don Reimer
Fulfillment Coordinator

Don oversees Travel Montana's fulfillment activities, assuring that 450,000 Lodging Guides, Recreation Guides and Vacation Guides, and more than a million copies of the state Highway Map reach consumers in an accurate and timely manner. He is also responsible for seeing that Chambers of Commerce and in-state businesses receive Montana travel publications. He supervises packing of all types of mailings, coordinates labels and sees that all packages are metered correctly. Don also receives and processes all incoming and outgoing division mail and maintains the travel literature inventory, verifying quantity and condition as shipments arrive from the printer.

Kaye VanGilder
Travel Counselor

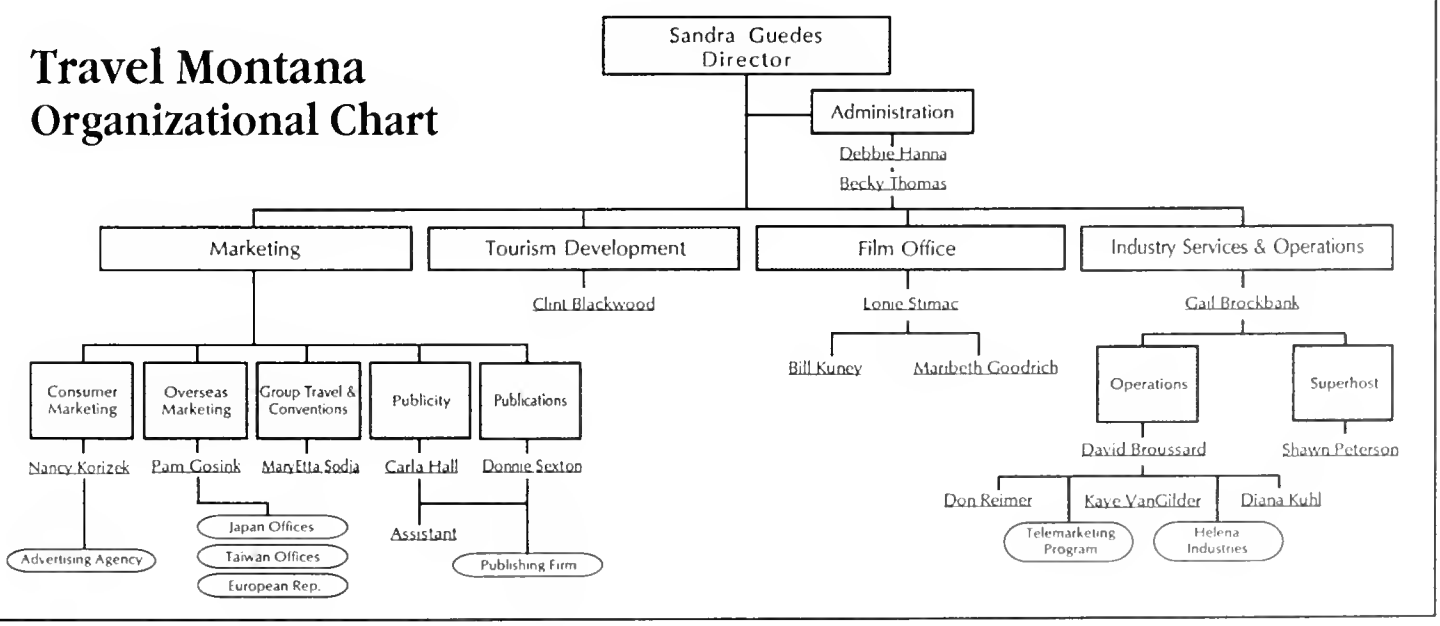
Often serving as the initial contact potential visitors have with Montana, Kaye and Diana play a vital role in creating a favorable first impression of the state. Relying on a storehouse of personal knowledge and a variety of information resources, they respond to multiple questions over the phone and provide details on events, attractions, weather, travel routes, and may guide people to a choice of accommodations in their requested price range. In addition, they receive Travel Montana's business calls from tour operators, film industry representatives, members of the travel industry, and others, expertly directing them to the appropriate staff members.

Kaye also serves as photo and video librarian — lending slides, videos and photos to tourism groups, publications and others with an interest in what Montana has to offer.

Diana Kuhl
Travel Counselor

During the summer travel season, Diana collects and compiles visitor counts from the state's main attractions. In winter and spring, she gathers information from Montana's ski areas for ski reports that are widely distributed instate and across the nation.

Travel Montana Organizational Chart



Travel Montana Marketing Plan

Stretching Marketing Dollars

Travel Montana regularly seeks involvement in cooperative marketing programs, both with other states and provinces and with private sector organizations and businesses. Such efforts enhance the appeal of the vacation product and stretch marketing funds for Travel Montana and its co-op partners. Listed below is a brief overview of some of the existing cooperative ventures undertaken by Travel Montana.

Private Sector Co-ops - Travel Montana undertakes several advertising, publishing and publicity efforts that are open to participation from tourism organizations and businesses. Programs include a downhill ski co-op with private sector participation in magazine, television, outdoor and Winter Guide advertising; advertising in the various trade and consumer publications; listings from communities, hotels and resorts seeking group travel business in an advertorial section in magazines targeting bus tour operators; and organization of journalist familiarization trips in cooperation with Montana's six tourism regions.

Old West Trail Association - Travel Montana is a long-time partner in the Trail, along with the states of Wyoming, North Dakota, South Dakota and Nebraska. Montana contributes one-fifth of the organization's $250,000 annual marketing budget, which is dedicated to increasing tourism and tourism revenue in the five-state region. As a result, Montana receives high-quality regional and national advertising exposure at one-fifth the cost of going it alone.

Montana/Wyoming National Parks Co-op - This long-time advertising partnership includes the states of Montana and Wyoming, TW Recreational Services and the Grand Teton Lodge Company (concessionaires at Yellowstone and Grand Teton National Parks, respectively). The co-op's annual spring magazine campaign featuring Glacier, Yellowstone and Grand Teton National Parks is one of the most effective inquiry-generators of all Travel Montana's programs.

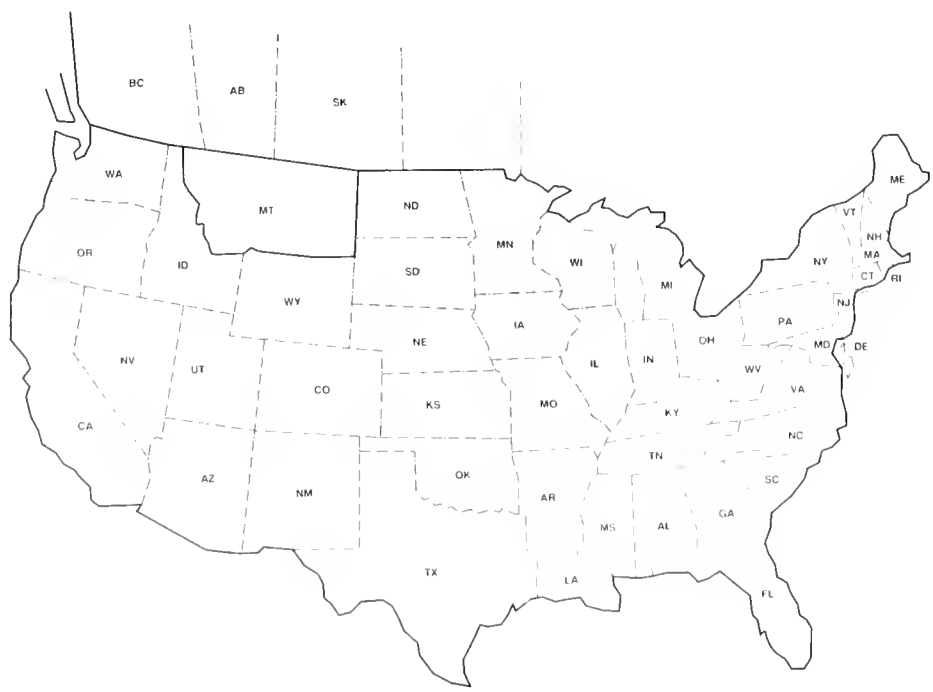
Trail of the Great Bear - Now in its formative stages, the marketing of this international scenic corridor from Banff to Yellowstone is expected to include cooperative advertising and publicity efforts undertaken in partnership with the province of Alberta and private sector organizations.

Consumer Advertising

Travel Montana's advertising program is designed to position Montana's vacation opportunities in the minds of consumers, ensuring that Montana will be considered as a vacation destination. This purpose is attained through the use of several means of paid advertising, often combined with other state and provincial travel offices and the private sector of Montana. Instate public service announcements are also widely used.

All advertising is targeted toward consumers whom marketing studies and experience have shown to be most likely to visit Montana: people who either live within a certain geographic area and fit a certain demographic profile, or have special interests that draw them to Montana, or both.

Montana's Prime Geographic Markets:



Fall Advertising - 1992

Broaden the Montana tourism season by building an image of Montana as a prime fall vacation destination, by targeting two main audiences: 1) the family vacationers who tend to take more vacations of shorter duration; 2) people who are likely to take longer trips outside of the summer season, namely the "empty nesters" and RV travellers.

Television Advertising

A new fall television spot modeled after the new "Montana Sings" summer spots, will be aired in the nearby markets of Regina, Spokane, North Dakota and South Dakota in July and August, 1992. The 30-second format will include versions featuring participating tourism organizations and Travel Montana's 800 number.

2/3-page, four-color, fall ad

Magazine Advertising

A new 2/3-page, four-color ad will be designed to feature those elements that cause people to travel in the fall. These will be inserted in a variety of targeted magazines, including *Trailer Life*, *Adventure Road*, *American Heritage*, *National Geographic Traveler* and *Travel & Leisure*.

Old West Trail Co-op

The Old West Trail Association, of which Travel Montana is a member, has shifted the emphasis of its marketing efforts to promote fall vacations in the Old West Trail states of Montana, Nebraska, North Dakota, South Dakota and Wyoming. Marketing/advertising strategy will include magazine advertising, public relations and production of themed publications.

Winter Advertising - 1992/93 Seasons

The primary purpose of Travel Montana's winter advertising program is to create and enhance an image of Montana as a prime winter sports vacation destination, with uncrowded conditions, perfect powder, friendly people, comfortable accommodations, and sensible prices.

Primary target audiences are nonresident male and female alpine skiers, nordic skiers and snowmobilers, ages 25-45, in the middle to upper income range. Older adults with children are a key target for an extended winter vacation.

Downhill Ski Co-op - 1992/93

This multifaceted marketing program is a joint venture between Travel Montana, the Montana ski areas and interested tourism organizations.

Elements of the campaign include magazine advertising, airport displays, outdoor boards, network and cable television, and ski reports. The Invite-A-Friend to Ski program (in which Montanans request that a letter of invitation and travel packet be sent to their friends by the Governor), and the Montana Road Show (in which participating ski areas host promotional/educational receptions in key target markets) are also important parts of this cooperative effort.

Five page, four-color, winter ad

The new advertising creative developed for the 1991/92 season for all mediums will be used again with minor updated revisions to the national magazine advertising. A new advertising creative will be developed for the complete Invite-A-Friend to Ski program.

To maximize the marketing effort, advertising dollars will target national ski publications such as *Ski* and *Skiing* and *Snow Country* and will be designed to reach larger, broader markets as well as the nearby markets to serve all levels of ski services offered in the state.

Summer billboards, featuring Montana as a winter destination, will be placed in strategic positions near or in both Glacier and Yellowstone National Parks. (Contingent upon budget and Tourism Advisory Council approval).

Ski Montana billboard

Nordic Ski Co-op - 1992/93

This advertising campaign is designed to reach cross-country skiing enthusiasts who travel in pursuit of the sport. The 1991/92 $^{2}/_{3}$-page, four-color ad will again appear in vertical publications such as *Cross-Country Skier* (the nation's #1 nordic skiing magazine) and in *Snow Country*. Inquiries will be tracked through the use of an extension number adjacent to Travel Montana's 800 number. Tip cards will also be used where budget allows.

Snowmobiling Co-op - 1992/93

This advertising campaign will be designed to reach snowmobiling enthusiasts who travel in pursuit of the sport. The 1991/92 $^{2}/_{3}$-page, four-color and $^{1}/_{6}$-page black-and-white directory ad will again appear in major snowmobiling publications, such as *Snowmobile* and *Snowmobile West*. Inquiries will be tracked through an extension number adjacent to Travel Montana's 800 number.

Spring & Summer Advertising

The purpose of Montana's spring advertising is to create and enhance an image of Montana as a prime vacation destination in both seasons, offering spectacular scenery, pristine environment, historic and cultural attractions, premier national parks, watchable wildlife, a variety of outdoor activities for both individuals and families, and an uncrowded and relaxing environment.

Target audiences will vary widely, from mass to highly vertical, depending upon the audience segmentation appropriate to the medium used. Generally, target spring and summer audiences fall into two groups:

- Active adventure seekers who participate in outdoor activities such as flyfishing, whitewater floating/rafting, backpacking, horseback riding, golfing and other outdoor pursuits.
- Travellers who enjoy sightseeing, including driving through spectacular scenery, visiting national parks and historic sites, and seeing other natural and commercial attractions.

Major Market Television Advertising - 1993

The new "Montana Sings" which first aired in the spring of 1992 will be used again for the second year. The spot includes footage that encompasses a broad range of Montana scenics. The Helena Youth Choir performs this most recent version of "Montana Sings," and Kenneth Ryan of the Fort Peck Indian Reservation performs the voice over.

The spot will target the following established markets: Washington, Utah, Colorado, Minnesota, South Dakota, Alberta, Saskatchewan, Manitoba, Portland, Los Angeles and San Francisco, with expansion to new markets and cable (special interest programming) pending budget availability. Average GRPs of 1,250 in each market.

A spot targeted specifically to the Canadian market will be developed and shown in Tourism Advisory Council approved markets. The spot will emphasize points of interest specific to that market.

The campaign will consist of five-week flights in each market, with all markets running mid-March through mid-May.

Magazine Advertising - 1993

Make a strong impression in the vertical markets through the use of special interest publications by using three different ad sizes. Create new 1/4-page, four-color Montana directory ads exploring the possibility of different themes per advertising category that we place media in (i.e. travel, RV/drive market, mature market, adventure seeker and sportsmen). Use 2/3-page, four color ads with creative based on the 1/4-page creative, in very high visibility publications and continue to use the existing 1/6-page, black-and-white directory ads for general interest publications.

The travel offices of Montana and Wyoming will continue to increase exposure and maximize advertising budgets through the Montana/Wyoming cooperative campaign. Existing ad creative, featuring Glacier, Yellowstone and Grand Teton National Parks will be used.

Potential exists to establish a joint marketing venture with the Trail of the Great Bear Society incorporating a magazine advertising program (contingent upon Tourism Advisory Council approval).

Invite-A-Friend Programs

Travel Montana's economical Invite-A-Friend marketing strategy continues to expand to include vertical targets. An Invite-A-Friend to Ski program (see Winter Advertising), begun in 1987, continues to generate a high rate of visitation to Montana at low cost. For summer, the following Invite-A-Friend programs are planned for 1993:

Invite-A-Friend to Montana

This year-round program encourages Montanans to invite their out-of-state friends and relatives to vacation in Montana, while reminding them of the vacation opportunities available in the state. The campaign will be promoted instate on a public service basis through the use of television, radio, newspapers, outdoor boards and reply coupons. Friends and relatives of participants (as well as participants themselves) receive a letter from the Governor and a Montana Vacation Planning Kit.

Invite-A-Friend to Golf

A joint venture between Travel Montana and Montana's golf courses and associations, this program encourages Montanans to invite their friends and relatives to golf in Montana, as well as enjoy the state's other attractions. The campaign will be promoted through reply coupons and point-of-purchase displays at golf courses statewide. Response piece is a Montana Golf Guide, featuring private and public courses.

Invite-A-Friend to Fish

A joint venture between Travel Montana and the Department of Fish, Wildlife & Parks, encouraging Montanans to invite their out-of-state friends and relatives to fish in Montana. Reply coupons for Montana anglers wishing to invite out-of-state friends and relatives will be available wherever fishing licenses are sold. Response piece is a Montana Angling Guide.

Invite-A-Friend to Camp

This proposed cooperative venture includes Travel Montana, the Montana Campground Owners Association, U.S. Forest Service, Department of Fish, Wildlife & Parks and participating sporting goods shops. Reply coupons and point-of-purchase displays are used as promotional mediums. Response piece is a Montana Recreation Guide.

Evaluation Mechanisms

Numerous mechanisms are used to measure the effectiveness of Montana's advertising efforts, including image research, creative testing, conversion studies and ongoing analysis of inquiries generated through advertising. Conversion studies are periodically undertaken to measure actual visitation as a result of the advertising. The studies measure effectiveness of various advertising mediums, origin of travellers, demographic information of visitors, etc. Travel Montana maintains complete records of all travel requests, including specifics related to the date of request, origin of the inquiry and the operator who handled each request. Detailed breakdowns of phone, written and television inquiries are used to evaluate the effectiveness of the specific advertising mediums, and track cost efficiency/ performance of ads.

Consumer Services

Consumer services performed by Travel Montana have a dual purpose: 1) to provide consumers with much needed travel planning assistance, and 2) to produce and maintain accurate statistical data for the evaluation of the Division's advertising efforts.

Travel Counseling & Inquiry Processing

Once Montana has been established as a potential vacation destination, it is necessary to provide prospective visitors with vacation planning information about the state. In order to accomplish this in a timely manner, it has been necessary to establish a telemarketing center at a location separate from the Travel Montana office.

Travel Montana owns and maintains computer and phone systems installed at the Montana State Prison in Deer Lodge. Travel Montana sets the program guidelines and procedures, provides staff training and closely monitors all aspects of the operation. Phone answering and data entry are performed by trained inmates and supervised by civilian employees.

Inquiry Fulfillment

In order to provide consumers with the travel literature requested, it is necessary to have all pertinent information accurately recorded in the Division's computer. After data entry, address labels or letters of invitation (for Invite-A-Friend) are printed and sorted, ready to be attached to the appropriate materials for mailing. Our standard calls for a turnaround time of no more than 48 hours.

During fiscal year 1992/93, Travel Montana is expected to handle approximately 450,000 requests for vacation literature.

In order to expedite Canadian inquiries and eliminate time-costly border delays, Travel Montana has developed a program to fulfill spring/summer television inquiries that originate in Canada. Using a fulfillment house, inquiries are sent via computer modem directly to the fulfillment house. At that time, a personalized letter outlining the benefits of a Montana vacation are sent, along with a Vacation Planning Kit to the Canadian consumer. The consumer receives the packet within 1 to 2 weeks maximum compared to a possible 3 to 5 week delivery if processed normally.

Evaluation Mechanisms

A small percentage of inquirers are contacted on a monthly basis to gather feedback on delivery time, accuracy of labeling, interaction from telemarketing staff, usefulness of packet, etc. Please see related evaluation mechanisms under Consumer Advertising, page 26.

Consumer Exhibiting

Travel Montana is represented at up to five consumer sport shows, with market selection complementing magazine and/or television advertising. Participation is expected to include:

- Anaheim Sports & RV Show
- To-Ro Sports Show, Seattle
- To-Ro Sports Show, Denver
- Northwest Sportshow, Minneapolis
- To be determined, possibly in Canadian market

This program allows staff to provide persuasive, on-site counseling to potential travellers. Two booth areas are rented at each show to provide adequate space to attractively display and distribute regional and state brochures. Montana's exposure at these shows is heightened through financial and staff support from the U.S. Forest Service and the Department of Fish, Wildlife & Parks.

Evaluation Mechanisms

After the exhibiting season, a limited number of participants are selected at random for an in-house survey. Data is gathered on visitation patterns — when visiting, return visit, length of stay, purpose of trip, planning influenced by show staff.

Consumer Publications

Publications play an important part in the vacation planning process of travellers, as often a potential visitor makes the choice between Montana or another vacation destination. Accurate information must be provided in a dynamic and reader-friendly format that portrays the variety of recreational opportunities and attractions available in Montana.

Montana Vacation Guide

A 48-page, four-color, glossy magazine that conveys high-quality images of Montana, organizing the information by region to include history, attractions and activities that help route visitors through the state. The publication includes images and information on wildlife, state parks, the Trail of the Great Bear and the Lewis and Clark Trail, as well as a pull-out highway map. Print 650,000. Available January 1993.

Montana Recreation Guide

A comprehensive directory of Montana's private campgrounds, public campgrounds and licensed outfitters, developed in cooperation with several other state and federal agencies. May also include fishing access sites. Approximately 44 pages. Four-color cover, black plus one color inside. Print 600,000. Available January 1993.

Montana Lodging Guide

A complete directory of Montana accommodations, including hotels/motels, bed & breakfasts, guest ranches, resorts, hostels and hot springs. Approximately 48 pages. Four-color cover, black plus one color inside. Print 550,000-600,000. Available January 1993.

Montana Highway Map

A large four-color piece folded to 6" x 9", which provides travellers with a detailed map and mileage chart on one side and vacation information, organized by tourism countries, on the back side. Print 800,000. Available year-round.

Montana Winter Guide

A 36-page, four-color, glossy magazine featuring Montana's winter activities. The publication includes specific information about downhill and nordic resorts, lodging listings for downhill areas, events, activities and information on how to get to Montana. Major airlines with service to Montana are partners in this effort. Print 100,000. Available August 1992.

Montana Calendar of Events

A two-fold, one-color brochure which details Montana's main tourism-oriented events and celebrations.

Summer Calendar (April-September) - Print 210,000. Available March 1993.

Winter Calendar (October-March) - Print 70,000. Available September 1992.

A second calendar of events is produced in cooperation with the Montana Chamber of Commerce for instate distribution, and accordingly includes events of local scopes such as various conferences and tournaments.

Summer Calendar (April-September) - Print 6,000. Available March 1993.

Winter Calendar (October-March) - Print 4,000. Available September 1992.

Montana Snowmobiling Guide

A 32-page, four-color, glossy magazine conveying a high-quality image of Montana as a snowmobile and winter destination. Organized by tourism region to cross-market other winter activities, events and attractions, the guide includes information about trail systems, trip planning, lodging and services, along with detailed maps. A cooperative project with the Montana Department of Fish, Wildlife & Parks, U.S. Forest Service and Montana Snowmobile Association. Print approximately 50,000. Available September 1992.

Montana Golf Guide

This three-fold, 12" x 18" brochure has been designed as a response piece for the Invite-A-Friend to Golf campaign. This four-color, glossy folder will include a location map, along with a listing of most private and all public golf courses. Print 10,000. Currently available.

Montana Angling Guide

This 16-page, four-color glossy guide has been designed as a response piece to the Invite-A-Friend to Fish campaign. The guide was produced in cooperation with the Department of Fish, Wildlife & Parks. Detailed maps, along with charts detailing the types of fish found in various Montana waters are included in the guide. Print 100,000. Currently available.

Montana Native American Lands Brochure

This three-fold, 12"x18" four-color brochure is being developed to give an overview of Montana reservations. The brochure will include a map and provide a short educational overview of Montana's reservations. Print 3,000-5,000. Available August 1992.

Montana Fact Sheet

This two-fold, one-color 8 1/2" x 14" brochure is designed as an educational piece. This ongoing sheet is used to provide Montana facts to libraries, schools and children.

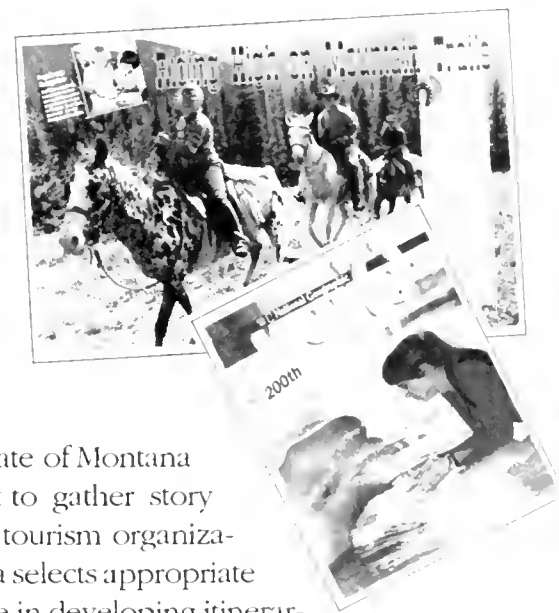
U.S. and Canadian Publicity

Publicity is one of the most believable and effective types of promotion a travel destination can get. Travel Montana utilizes an aggressive plan to generate publicity exposure in national magazines, television shows, and regional and local publications. Key travel and news media, both broadcast and print, will be targeted for editorial coverage of Montana in 1992/93.

Publicity Blitzes

Publicity blitzes are trips to major publishing centers for the purpose of making personal contact with as many media decision makers as possible in a short period of time. This personal contact with editors and producers allows for discussion of new ideas and follow-up. The major publishing cities of New York, Los Angeles and Des Moines will be targeted.

Past blitz results



Writer Familiarization Trips

Writer familiarization (fam) trips are hosted trips to the state of Montana for carefully selected writers who are on assignment to gather story information. Travel Montana encourages the regional tourism organizations to participate in writer fam projects. Travel Montana selects appropriate publications, makes the contacts and provides assistance in developing itineraries. The fam is then hosted by the nonprofit organization.

Video Production & Distribution

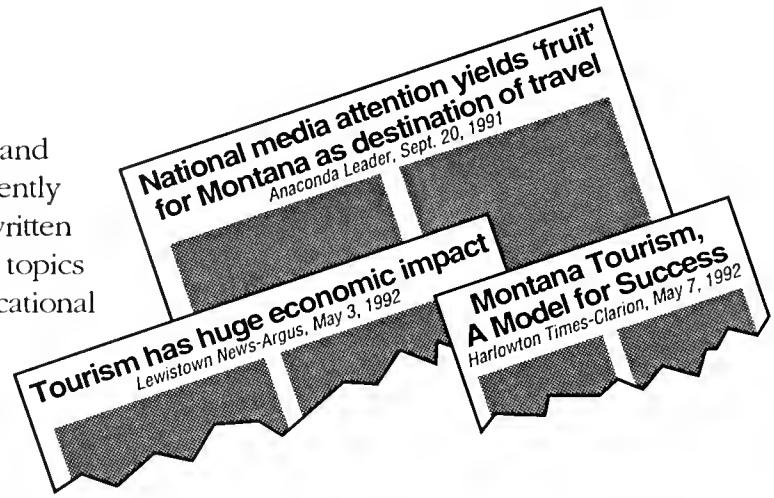
Video distribution efforts over the last three years have been so successful that new video products are needed to keep interest and usage high. New summer, fall and winter film footage will be produced this year. A reedit of existing videos incorporating new footage, a new script and a new soundtrack will provide that new programming. This will be edited with TV commercial breaks into a half-hour format, available in all broadcast media formats.

Video News Releases

Video News Releases (VNRs) are two-to-three minute news segments which are pre-produced and then distributed by satellite and by tape to news directors at approximately 750 independent stations across the country. A typical VNR is seen by approximately five to fifteen million households. As a contingency plan to counteract negative publicity or relay a pressing news story, Travel Montana is prepared to produce one VNR this year.

Instate Publicity

Instate media, both electronic and print, are conducted as frequently as feasible and provided with written press releases or interviews on topics that are newsworthy and educational for Montana residents.



Calendar of Events

Media calendars of events listing dates, contact people and a short description of each event are distributed to writers, editors and producers with the semiannual press kits (see next page) on an as-needed basis. These calendars differ from the ones produced for distribution to consumers, because of the special needs of the media, such as longer lead time and greater descriptive detail.

Publicity Assistance

Once interest is generated among writers and editors, Travel Montana must be able to offer assistance with airfare, lodging, guides, meals and/or transportation for major projects. Last year, such assistance was provided to media including ESPN, News Travel Network, *SKI Magazine*, *Sunset Magazine* and the *Minneapolis Star Tribune*.

Travel Montana offers writers, editors and producers access to color slides, black-and-white photos and stock video footage, in addition to providing writer/photographer referrals, editorial copy, and individual assistance.

Typical editorial coverage

Quarterly Newsletter

"Untold Story Leads from Montana" is mailed to approximately 450 editors, writers and producers. The newsletter offers brief, factual story ideas and provides a quarterly reminder to the media that Montana has a wide range of subjects to cover.

Keeping In Touch

Regular mailings provide continued contact with important media, update their background information files, spark new story ideas and keep our list current. Scheduled for mailing this year are two press kits (summer or winter vacation guide, media calendar of events, an appropriate issue of "Untold Story Leads from Montana") and a high-quality, four-color poster.

Publicity Workshops

A workshop will be offered to private-sector individuals and organizations who deal with publicity in regional or city tourism organizations, as well as other interested industry members. The first section will be educational and the second section will focus on action plans and ideas. A publicity plan book will be provided for each participant.

Evaluation Mechanisms

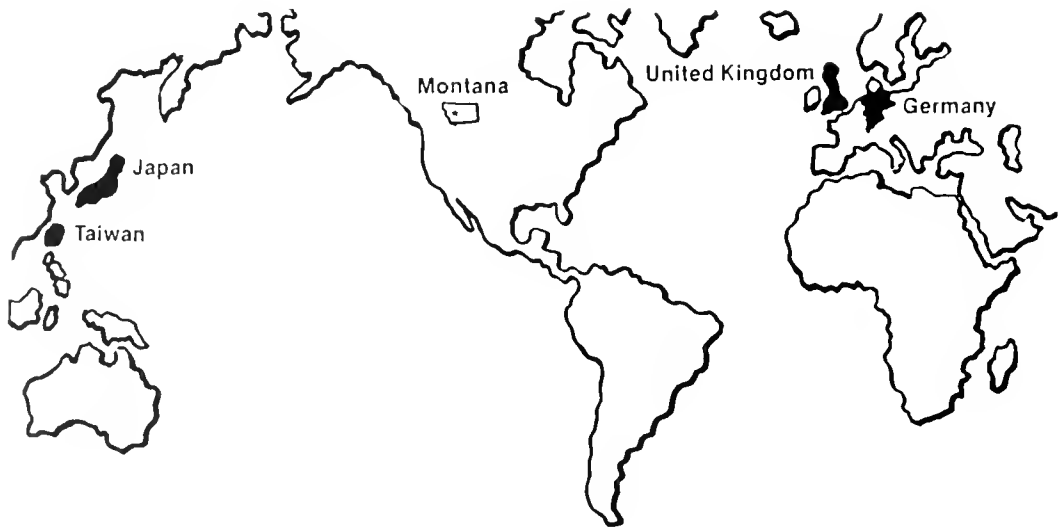
Each year, research is done to estimate the dollar value of publicity generated as a result of these programs. Each publicity item is "valued" at the cost for a similar amount of advertising space in the same medium. In calculating comparable publicity amounts, we differentiate between "assisted" and "unassisted" publicity.

Overseas Marketing

Travel Montana aggressively promotes Montana as a destination to the international travel trade, with emphasis on United Kingdom, Germany, Japan and Taiwan. The emphasis is on working with key tour operators, wholesalers and travel agencies to establish new Montana itineraries for groups and FIT's (individuals), while assisting Montana businesses in their marketing efforts overseas.

The program includes representation at key international travel trade shows, familiarization tours, advertising, brochure and video distribution and ongoing personal contact with targeted tour operators, wholesalers and travel agents.

Montana's Overseas Markets:



Overseas marketing efforts consist primarily of the use of the following methods:

Overseas Marketing Workshop

To assist Montana businesses interested in becoming involved in or increasing their share of overseas visitors, an in-depth seminar is planned for the fall of 1992. The main emphasis will be on how to most effectively sell Montana and work with the overseas travel market and successfully host international visitors. The workshop will count on participation by experts in the field from state, national and international levels.

Trade Shows

Visibility at the key international travel trade shows allows Montana to make contact with wholesalers, operators and the opportunity to follow-up on new and existing projects and ideas. Travel Montana delegates are sometimes joined by private-sector participants, and booths are commonly shared with surrounding states.

Business Missions

The marketing foundation of 1992/93 missions will be a prearranged schedule of travel industry and press appointments in the markets to be visited. Each mission includes workshops, sales calls, seminars, and may conclude with a promotional function for targeted travel industry and media representatives.

Familiarization Tours

With the assistance of Montana travel industry members, "fam" tours will be conducted to provide firsthand knowledge for prospective tour operators. By experiencing Montana, operators can better understand the mechanics of designing new itineraries in the state. Fam tours will also be held for carefully selected travel journalists, with the intended result of generating positive travel articles in foreign publications.

Other Promotional Activities

Will include the distribution of promotional publications and videos, in foreign languages when possible; and the development of innovative promotional projects.

Trade Advertisements & Promotional Posters

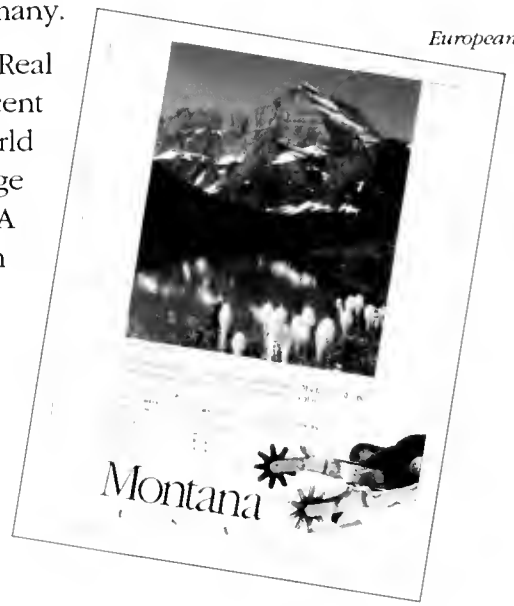
To increase awareness of Montana among travel trade representatives, timely insertions in travel trade publications are planned. Promotional posters will also be distributed for display at outlets promoting travel to Montana.

Direct Mail Campaign

This specialized direct mail program will provide current tour planning material to tour operators, as well as follow-up to contacts initiated during trade shows. This program also establishes and maintains a professional rapport with overseas group and FIT travel planners.

Western Europe

The European marketing program includes use of the services of specialized travel representatives, on a contractual basis, in cooperation with the states of Wyoming and South Dakota. Primary markets are United Kingdom and Germany.



European ad

Under the Rocky Mountain International banner of "The Real America," Montana has seen tremendous success in recent months. The three states will participate jointly in World Travel Market (London), International Tourism Exchange (Berlin), Pow Wow Europe (Brussels), and Pow Wow USA (San Francisco). Sales missions will be carried out in Germany and the United Kingdom.

Fam tours scheduled for upcoming months will be bringing both product development managers and sales executives from major tour operators, as well as some excellent journalists, to our state.

Following the unprecedented success of the recent "City Slickers" promotion in the United Kingdom, Montana will continue to pursue development of similar opportunities to increase consumer awareness through promotional partnerships with distributors of American films/videos which feature the types of vacation opportunities available in the region.

Pacific Rim

Montana's offices in Tokyo and Taipei are legislatively mandated and funded by three entities: tourism, agriculture and manufacturing. Trade office representatives market Montana's travel-related products and services to the travel trade in their respective countries under close direction from Travel Montana. Their responsibilities include contact with wholesalers, tour operators and travel agents, to create demand for Montana's travel-related products and services. This objective is achieved through distribution of travel materials, organization of familiarization trips, translation of Montana literature and attendance at travel trade shows.

In partnership with the state of Utah and Wyoming, Montana undertakes various marketing efforts under the banner of American Rockies/Highway 89. The program, which targets development of tour itineraries by six major Japanese tour operators, was initiated in 1987 and operated successfully since. It consists of an annual tri-state trade mission to Japan, fam trips, and an annual seminar for the U.S.-based representatives of the six tour operators (West Coast).

Evaluation Mechanisms

Tracking the number of Montana tourism itineraries which have been added or expanded by international operators/wholesalers, the interest level of consumers and trade representatives in the overseas target markets and monitoring changes in travel expenditures of overseas visits (USTTA & ITRR), it is possible to direct marketing efforts.

U.S. and Canadian Group Travel

Montana's domestic group tour program is designed to promote Montana's many group tour and travel opportunities by marketing directly to group tour operators from throughout the United States and Canada. Montana is promoted as a tour destination, as well as a viable stopover on tour itineraries passing through Montana. The program promotes all seasons of Montana, and encompasses activities from sightseeing to river rafting to skiing.

Familiarization Tours

Familiarization tours will be conducted to provide personal, firsthand site inspections for prospective group tour operators. By experiencing Montana, tour operators can better understand the mechanics of designing new itineraries in Montana.

Keeping In Touch

This specialized direct mail program will provide current tour planning material, as well as establish and maintain a professional rapport with group travel planners throughout the United States and Canada

Tour Kits

These "newsletters" will be distributed periodically to approximately 1,750 group tour planners. The kits will feature promotional text prepared by Travel Montana, highlighting tour attractions located throughout the state.

Calendars

A targeted mailing of 350 Montana Calendars will be made to selected group tour operators. Featuring many aspects of Montana, the calendars will communicate a positive image of Montana as a scenic tour destination.

Montana Magazine

This bimonthly magazine will be sent to 150 targeted group tour operators. With new tour attractions featured in each issue, this direct mail effort is designed to inform and educate group tour operators.

Travel Trade Events

By attending select travel shows and conventions, contacts can be made with prospective group tour operators and new and expanded Montana itineraries can be discussed and promoted. Selected tour operator consumer shows will also be attended by Travel Montana to enhance and support sales of existing Montana tours packaged by qualified tour operators.

National Tour Association (NTA)

Travel Montana will attend both the annual marketplace and convention in Seattle in November of 1992 and the Spring Exchange in Birmingham, Alabama in April of 1993. Two Travel Montana representatives will attend the fall marketplace and one will attend the spring meeting.

American Bus Association (ABA)

One representative from Travel Montana will attend the annual marketplace and convention, scheduled for early December in Detroit.

Tour Operator Consumer Shows

Travel Montana will attend and promote Montana in selected tour operator shows. Milwaukee, Minneapolis, Dallas and Sacramento are tentatively scheduled.

Ski the West Fest

Travel Montana will send one delegate to this travel agent show sponsored by Delta Air Lines. Scheduled for late September, this show will once again be in Salt Lake City.

Sales Blitzes

Personal sales calls will be made to selected group tour operators. This effort will assist in the development of new and expanded Montana tour programs, as well as establish and maintain Montana's presence in key markets. These sales calls will be timed, wherever possible, in conjunction with Travel Montana media advertising and/or participation at consumer and trade shows.

Group Travel Workshop

This seminar/workshop is planned for members of the Montana travel industry who are interested in working with the group travel industry. The seminar will focus on effective techniques for development of group tours.

Advertising & Marketing

Specific projects will be undertaken to heighten consumer awareness of Montana, as well as awareness of group tour operators in the United States and Canada. Planned projects include a Montana entertainment set at a visible function during the annual convention of NTA, timely insertions in travel trade publications, and cooperative advertising projects with the private sector.

Courier Magazine

A trade magazine of the National Tour Association, this publication is distributed free of charge to some 500 NTA group tour operator members and to approximately 3,000 tour supplier members. This will be a cooperatively funded project with the tourism industry of Montana.

Four page, four-color, group tour ad

Destinations Magazine

Similar to Courier, Destinations magazine is a travel trade publication distributed to both group tour operators and tour suppliers. This project will also be a cooperatively funded effort with the tourism industry of Montana.

National Tour Association Function

Travel Montana, in cooperation with Montana's travel industry, will provide entertainment during the "Taste of North America" function during the fall NTA Convention in Seattle. The function will be attended by approximately 3,500 tourism professionals. Dottie Maitland of Maitland Travel in Kalispell will be sworn in as the new president of the National Tour Association for 1992/93. This will give Montana additional exposure, not only during the convention, but throughout Dottie's entire term of presidency.

Promotional Posters

Travel Montana will work to increase consumer awareness through distribution of promotional posters. Distribution channels will include travel agencies, group tour offices and conventions and meetings.

Image Brochures/Tour Shells

Creating and distributing image brochures will be an additional method used by Travel Montana to increase consumer awareness. Distribution channels will be the same as those used for the promotional posters. Distribution of tour shells will help operators sell specific Montana itineraries.

Press Releases

Travel Montana will prepare and distribute several press releases over the course of the year in order to keep Montana visible in travel trade publications.

Group Tour Planning Guide

The Montana Group Tour Planning Guide is designed to be an "all-in-one" tour planning reference. With listings of attractions, events, hotels and restaurants the guide encompasses the points of interest of the tour planner designing a Montana itinerary.

Evaluation Mechanisms

The number of group tours travelling in and through Montana is tracked by permits issued by the Montana Department of Highways. Additionally, group travel promotional efforts are evaluated through personal contacts and meetings with key tour operators at national conventions.

Convention Promotion

Montana is fast becoming a key destination consideration for convention and meeting planners nationwide. To further strengthen Montana's image among these decision makers, Travel Montana has expanded its convention marketing efforts.

A comprehensive program for the promotion of meetings and conventions has been designed in cooperation with the Montana Innkeepers Association, and with input from Convention & Visitors Bureaus.

As an image-setting strategy, a two-tier direct mail campaign was undertaken in 1991/92.

Direct Mail Campaign

The first mailing was a four-color image piece, produced and distributed by Travel Montana to approximately 10,000 targeted meeting planners nationwide. The piece was a self-mailer, and included a bind-in reply card or coupon allowing recipients to request additional information.

The mailing list was compiled from listings in the *Association Meeting Planners & Conference/Convention Directory* and the *1991 Hotel Sales Guide to Convention Business.* Type of organization, state of origin and convention size was considered in the development of the list. The list is available in a variety of formats to interested CVBs and tourism regions.

The second mailing acted as the fulfillment piece for the first mailing, and included a letter of invitation from the Governor and a new Montana Meeting Planner's Guide. For the first time, the guide was produced by Travel Montana and listings were available to all meeting facilities in the state. The editorial goal was to first sell the state, then the region, then the individual facilities. Travel Montana will continue to monitor the program and distribute leads as they come in.

"Invite-A-Convention"

This campaign is promoted instate through letters from the Governor to state employees, Montana corporations, agencies and associations. The letter is aimed at encouraging employees of those organizations to bid conventions when they travel or attend conferences. Additionally, the program encourages them to contact Travel Montana for a "Convention Kit," containing tips on bidding and planning a convention, as well as a Meeting Planner's Guide listing convention and meeting facilities statewide.

Another aspect of this campaign is a letter from the Governor, along with a Vacation Planning Kit, encouraging association members to attend conventions scheduled to take place in Montana and inviting potential participants to extend their stays in Montana in conjunction with their conventions. This portion of the campaign is a joint venture between Travel Montana and the CVB, region or convention planner.

Evaluation Mechanisms

Travel Montana tracks the number of inquiries received from the direct mail campaign as a measurement of the level of interest in Montana as a convention destination. Distribution of all "Invite-A-Convention" packets will be tracked as well.

Industry Services

As Montana becomes better known as a travel destination, it is necessary to assure that travellers are serviced in a manner that makes them want to return again and speak highly of their Montana vacation experience to friends and relatives.

Travel Montana's industry services are aimed at supporting and cooperating with the private sector by increasing the awareness of the economic benefits of travel and tourism, providing information on market planning to assist organizations and businesses in improving and increasing their business, creating an atmosphere of western hospitality and improving the state's economic base through these efforts.

Disbursement of Funds to Certified Tourism Organizations

The Lodging Tax Law specifies that approximately 23.5% of the accommodations tax proceeds will be returned on a prorated basis to six tourism regions and nine qualifying cities (as shown on pages 8 and 9) for their promotion as a travel destination or movie filming location.

Typical projects undertaken by these tourism organizations include brochures, travel guides, television advertising, full-color and directory print ads, convention marketing and consumer and trade show exhibiting. Travel Montana's responsibilities include:

- Review of each project proposal, to ensure compliance with Tourism Advisory Council (TAC) guidelines and the law.
- Presentation of regional/CVB marketing plans and projects to Tourism Advisory Council for approval. (Assistance in development is available for tourism organizations from Travel Montana if desired.)
- Annual audits of tourism organizations.
- Refinement of compliance procedures to provide a more streamlined process, yet meet all legal and guideline requirements.
- Annual workshop/brainstorming session in April to review and update program requirements. Refresher course at 6 months.

Superhost Program

The Montana Superhost program is designed to provide an ongoing, comprehensive, community-based system for strengthening customer service and improving visitor information resources throughout the state. Listed below are the planned activities of the program:

Certified Trainers

The fifteen certified Superhost trainers are conducting seminars throughout Montana on an ongoing basis. These trainers are responsible for marketing the program to communities and businesses within their designated regions.

Superhost Business Designations

In addition to certifying communities, the Superhost program will begin certifying businesses in August, 1992. In order to become a "Superhost Business" a majority of a business's current staff needs to have completed a Superhost seminar within the past 24 months. Information highlighting the importance of the Superhost program will be included in at least one Travel Montana publication and businesses will receive a Superhost window/door sign.

Promotional Materials

Promotional materials will be developed, including a brochure, poster, black-and-white newspaper slicks, that can be used by communities and trainers to market the Superhost program.

Quick Reference Guide

A 24-page Quick Reference Guide has been developed for employees and volunteers who are frequently asked for Montana travel information. The guide includes answers to questions frequently received by telemarketing at Travel Montana, and is available for $3.50 per copy.

Superhost Video

A Superhost video will be developed focusing on customer service training for visitor information center (VIC) staff. The video will also be made available (at cost) to certified Superhost businesses to provide subsequent customer service training at a reasonable cost. The video is not a replacement for the 4-hour Superhost seminars, but rather as reinforcement for concepts presented at the Superhost seminars.

Superstar Recognition Program

Montana is known for its friendly people and Travel Montana would like to acknowledge some of the customer service experts throughout Montana. Superhost certified trainers will provide on-the-spot recognition for front-line employees who provide outstanding customer service. Recipients of this award will receive a "Superhost Superstar" pin and a follow-up letter from the Governor.

Superhost In The Schools

A large part of the Montana tourism industry's front-line employees are high school and college students. In 1993 Travel Montana will offer reduced rates ($2/student) for contracted trainers to facilitate the Superhost program in high school vocational and career classes on a limited basis. Additionally, Travel Montana will seek a sponsorship for the educational program.

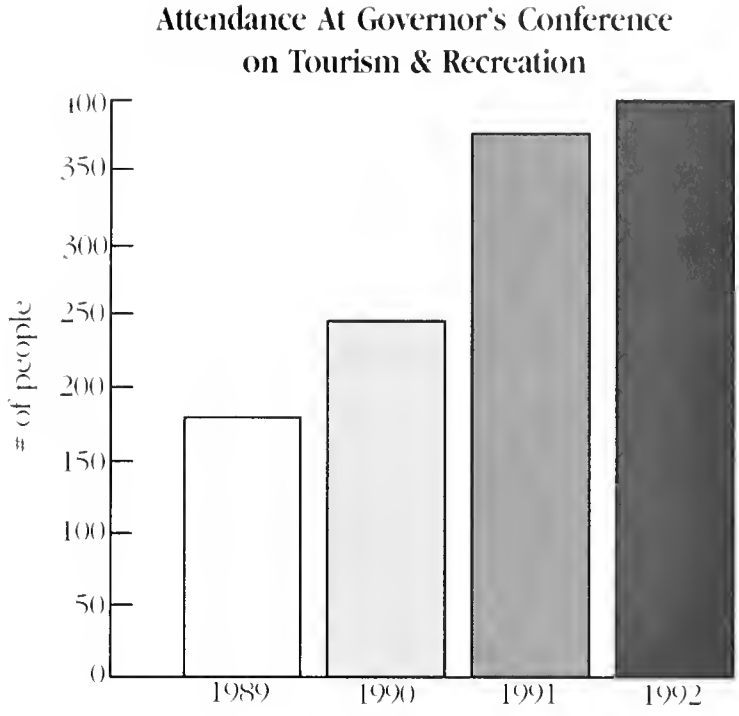
Data Base

A data base will be developed that will track the number of Montanans who have successfully completed Superhost training. This data base would be used in developing demographic information to determine what types of businesses are currently participating in the Superhost program, what businesses may need to be more heavily targeted and to assure that the training manual meets the needs of its users. Information will be acquired through the standardized registration forms submitted by certified trainers.

Governor's Conference on Tourism & Recreation

The focus and purpose of the annual Governor's Conference on Tourism and Recreation is to provide members of Montana's travel industry with marketing tips, research results and hands-on workshops, as well as encourage networking between industry members and appropriate public sector agencies.

The annual travel conference is a self-sustaining project, supported by registration fees of attendees and numerous sponsors. Following each conference attendees have the opportunity to return an evaluation form. Information gathered from this form is incorporated into future planning to accommodate the needs and interests of attendees. The conference is traditionally held in Helena during regularly scheduled legislative sessions.

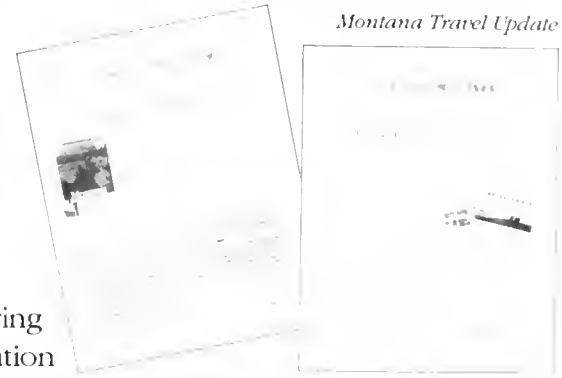


Instate Industry Awareness

Increasing instate awareness of the value and impact of the travel industry is a priority for Travel Montana. Listed below are some of the efforts aimed at building industry awareness and disseminating news, marketing tips and trends to members of the industry.

Montana Travel Update

This newsletter is published 6 times annually by Travel Montana, and includes participation by the Institute for Tourism and Recreation Research. Regular features include perspectives from guest columnists, research projects, industry events and updates on various Travel Montana efforts.


Montana Travel Update

Inside Commerce

This newsletter is published by the Department of Commerce and regularly includes articles by Travel Montana.

Education

Opportunities will be pursued and evaluated during the year on methods to disseminate information related to the tourism industry through Montana's elementary and secondary school system.

Travel Montana evaluates the success of instate industry services primarily through evaluations from participants at events. These surveys are tabulated in-house with the results being used to design future programs which fill the requests of residents.

Tourism Development

As Montana develops its tourism and recreational potential, coordination of efforts within Montana becomes increasingly important. The main emphasis of this area is to coordinate and facilitate cooperative tourism-related efforts between federal and state agencies and private sector interests.

Interagency Coordination

Extensive cooperative partnerships will be further cultivated among appropriate state and federal agencies, such as the Department of Transportation; Department of Agriculture; Department of Natural Resources; Department of Fish, Wildlife & Parks; Montana Historical Society; United States Forest Service; National Park Service; and Bureau of Land Management. Periodic interagency meetings explore possible partnerships on such programs as the Trail of the Great Bear, Scenic Byways, Backcountry Byways and Watchable Wildlife. Additionally, cooperative partnerships are forged to establish strategic long-range planning, market research and evaluation, and effective interagency communications. Issues on a national, state and regional level will be monitored in an ongoing effort to keep the Montana tourism industry in an "active" position. Some current issues of specific interest are:

- Visitor Information Centers.
- Creation of a new, statewide interagency promotion (i.e. development of comprehensive Lewis & Clark Trail campaign).
- Strategic Plan for tourism and recreation industry.

Counseling & Education

In an ongoing effort to provide technical assistance to the private sector on tourism issues, Travel Montana will cooperate with other agencies to complete the local tourism assessment project in Teton County. Joining Travel Montana in this pilot effort is the Montana Extension Service, United States Forest Service, the Small Business Administration and the Institute for Tourism and Recreation Research. Scheduled for finalization in the fall of 1992, this project focuses on amenity resource development of potential rural tourism opportunities, while studying the anticipated economic, social and environmental consequences of such development. Additionally, supplementary workshops may be initiated by Travel Montana to further inform and educate the private sector on new state and federal efforts related to pending tourism developments in Montana.

Financial Assistance Inventory

An extensive inventory of financing options will be compiled to more effectively assist private businesses or organizations in their search for supplementary funding. This inventory will include available federal, state, regional and private sources of monies in the form of loans, grants and matching funds opportunities. This inventory will facilitate the matching of private sector demands to the appropriate funding source(s).

Strategic Tourism Plan

The five-year strategic plan for travel and tourism is scheduled for completion by September of 1992. Drawing from the input of a broad spectrum of the tourism industry, this new strategic plan will create a collective vision clearly illustrating where the Montana travel and tourism industry envisions itself in five years. Development, marketing and promotion objectives and measurable benchmarks will be set to guide in the development of Montana's travel and tourism industry into the mid-1990s and beyond. This five-year plan will highlight how Montana can move into the future, while preserving and enhancing the tourism amenities available today.

Visitor Information Center Project

Travel Montana will continue its efforts to develop a statewide system of visitor information centers by offering support to new and existing community-based centers. In its effort to facilitate the establishment of effective travel information centers at key entrance points into Montana, Travel Montana will support certain development and operational components for the seven sites designated in the Visitor Information Center Report to the 52nd Legislature. The sites are:

-Haugan/St. Regis (I-90 West)
-Dillon (I-15 South)
-Culbertson (Highway 2 East)
-West Yellowstone (Highway 287 & 191)
-Hardin (I-90 East)
-Shelby (I-15 North)
-Wibaux (I-94 East)

Each of these designated sites will be required to meet design and operational standards such as minimum size, appearance and seasonality. Travel Montana's support of these centers would include providing brochure racks, information counter, kiosks, signage, video equipment, computer and partial staff funding. Travel Montana will continue to offer technical and resource assistance to the many other community-based information centers located throughout the state. In addition, Travel Montana will work to foster public and private-sector partnerships to ensure a high-quality and affordable visitor information center program.

Indian Tourism Working Group

Travel Montana, through the newly created Indian Tourism Working Group, will continue to work closely with the Native American population of Montana on issues of tourism development and promotion. Periodic meetings will explore areas of concern, such as how Travel Montana and the Indian tribes can most effectively promote cultural events and attractions without exploitation.

Trail of the Great Bear

Travel Montana will be involved in the implementation of this international scenic corridor running from Banff National Park in Canada to Yellowstone National Park. Implementation of this project requires coordination of efforts among several state/provincial agencies and communities along the route in areas as diverse as interpretive programs, road signage, information services and marketing. Project implementation will be directed by the Trail of the Great Bear Society Board of Directors composed of members of the private sector and an advisory board to include representation by Travel Montana and the Alberta Tourism Office.

Film Industry Promotion and Services

Travel Montana promotes the state as a film location for feature films/commercials, television, documentaries, music videos and still photography, and provides information, scouting and support services to the motion picture industry — including producers, directors, location managers and studio executives.

Advertising & Marketing

Specific promotion projects are undertaken by Travel Montana to build and sustain the production community's awareness of the state as a prime filming location.

Trade Magazine Advertising

Montana ads will be featured in several trade publications such as *AFCI Locations, Backstage Shoot, Kemps International Yearbook, Location Update, Madison Avenue Handbook, Producer's Masterguide, Hollywood Reporter,* and *Daily Variety.*

Photo Essay Brochure

An 8-page brochure distributed as an addendum to the Montana Production Guide. It is also used for separate distribution at trade shows and as a direct mail piece.

"Hollywood Reporter" Montana Issue

Explore the possibility of having the *Hollywood Reporter* dedicate a special issue to "shooting on location" in Montana. Montana production support service companies would then be allowed to purchase ad space to highlight their services. This type of issue is contingent upon raising adequate ad revenue to support the additional editorial.

Writer's Fam Trip

Host writer and photographer from *Location Update* magazine for cover story on Montana as a movie location, visiting existing sets, as well as various areas in Montana.

Promotional Poster

One duotone poster will be produced to complete the current series on dramatic Montana locations. It will be distributed at trade shows and as a limited direct mail piece.

Calendars

A targeted mailing of Montana calendars featuring Montana locations will be sent to selected producers, directors, studio executives and location managers. These calendars will provide a monthly reminder of the state as a location.

Montana Production Guide

The Montana Production Guide is distributed to key decision makers within the motion picture industry. It is an all encompassing reference for shooting a production in Montana. The 150-page guide details the following information: production services and crews; contacts for federal, state, and city agencies; weather data; aircraft charter; and major towns and cities, along with photos of Montana locations. Approximately 2,500 guides are produced every 18 months.

Trade Shows & Film Festivals

Being represented at major industry trade shows and film festivals in the United States and abroad allows Montana the opportunity to increase awareness and knowledge of the state as a film location on a one-to-one basis.

Sundance Film Festival

A nationally recognized film festival held in Park City, Utah where directors, producers and studio executives meet and conduct workshops and screen new, independent feature films and documentaries. (January 1993)

Los Angeles Expo

A major annual motion picture trade show attracting up to 6,000 major decision makers in both U.S. and foreign markets. This show is co-sponsored by the American Film Market and the Association of Film Commissioners International. (March 1993)

"Thank you for filming in Montana" ads

Evaluation Mechanisms

Travel Montana tracks location inquiries and requests as a measurement of the level of interest in the state. The true measure of success, however, is the increasing amount of revenue generated in Montana through motion picture and commercial projects. Production company expenditures are calculated from data collected by the film office from personal interviews and a mailed questionnaire sent at the completion of the project. These figures are then presented in aggregate on an annual basis. Additionally, there is a long-term result -- building the image of Montana as a viable location -- which is difficult to quantify, but provides a return in future productions.

Travel Montana Marketing Calendar 1992-93

	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Consumer Advertising	• [illegible] Ads [illegible] • [illegible]	• [illegible] TV Ads: Regina, Spokane, North Dakota, South Dakota • Fall Magazine Ads	• Ski Montana Magazine Ads • Ski Montana TV Ads (Cable)-Seattle, Minneapolis	• Ski Montana Magazine Ads • Cross Country Ski Magazine Ads • Snowmobile Magazine Ads • Ski Montana TV Ads (Cable)-Seattle, Minneapolis • Ski Montana Billboards-Seattle, Minneapolis, North Dakota, Saskatchewan • Ski Montana Road Shows: North Dakota, Saskatchewan, Alberta, Idaho • Invite-A-Friend to Ski	• Ski Montana Magazine Ads • Cross Country Ski Magazine Ads • Snowmobile Magazine Ads • Ski Montana TV Ads (Cable)-Seattle, Minneapolis • Ski Montana Roadshows-North Dakota, Saskatchewan, Alberta, Idaho • Ski Montana Airport Displays-Salt Lake City	• Ski Montana Airport Displays-Salt Lake City • Ski Montana TV Ads (Cable)-Seattle, Minneapolis
Trade Advertising & Promotions	• [illegible] • [illegible]	• Film Office Ads • Media Direct Mail-Winter Calendar of Events • Tour Operator Direct Mail-Tour kit	• Film Office Ads • Publicity Newsletter Direct Mail-Winter • Winter Press kit Direct Mail • Tour Operator Direct Mail-Montana Magazine	• Film Office Ads	• Film Office Ads • Film Office Calendar Direct Mail • Group Travel Direct Mail-Calendar • Tour Operator Direct Mail-Tour kit • Tour Operator Direct Mail-Montana Magazine	• Film Office Ads • Publicity Newsletter Direct Mail-Spring • "Destinations" Magazine Ad
Familiarization Tours		• "City Slickers" Japan Press Fam	• U.S. Tour Operators Fam-Montana/Idaho/Wyoming • Hwy 89 Fam • USTTA Travel Counselors Fam (7-15) • U.K. Sales Executives-Getaway Fam			
Tourism Events & Projects	• Group Travel Workshop		• Tourism Advisory Council Meeting (8-9)-tentative • "City Slickers" (U.K.) Cattle Drive (13-20)	• Publicity Workshops (Regional)		• Tourism Advisory Council Meeting (14-15)
Sales & Trade Missions		• Group Travel Sales Calls-California	• Hwy 89 Trade Mission (21-29)	• Overseas Group Travel Sales Calls-California (16-18)	• Media Blitzes	
Trade Shows		• Frontier Travel Trade Show-Sacramento	• Ski the West Fest-Salt Lake City • Pow Wow Europe-Brussels (1-3) • Huddle West-Phoenix (24-26)		• National Tour Association (NTA) Fall Exchange: Montana Event-Seattle (8-13) • World Travel Market-London (26-29)	• American Bus Association (ABA) Marketplace-Detroit (6-9) • Taipei Int'l Travel Fair-Taipei (3-8) • Trade Show-Japan
Consumer Travel Shows						
Publications	• Film Office Newsletter	• Winter Guide • Native American Lands Brochure • Montana Travel Update	• Winter Calendar of Events • Snowmobiling Guide • Group Tour Planning Guide	• Montana Travel Update		• Montana Travel Update

	JANUARY	FEBUARY	MARCH	APRIL	MAY	JUNE
Consumer Advertising	•Spring/Summer Magazine Ads •Ski Montana Airport Displays-Salt Lake City •Ski Montana TV Ads (Cable)-Seattle, Minneapolis •Ski Montana TV Ads (Network) Lethbridge, North Dakota, Idaho, Southern Saskatchewan, South Dakota	•Invite-A-Friend/EZ 2 LUV Campaign (coupons, billboards, newspapers, TV, radio) •Spring/Summer Magazine Ads •Ski Montana TV Ads (Cable)-Seattle, Minneapolis •Ski Montana TV Ads (Network) Lethbridge, North Dakota, Idaho, Southern Saskatchewan, South Dakota	•Spring/Summer Magazine Ads •Summer TV Ads Washington, Alberta Colorado, Minnesota, South Dakota, Nebraska, Utah, Saskatchewan, Los Angeles, San Francisco •Invite-A-Friend to Fish	•Spring/Summer Magazine Ads •Summer TV Ads-Washington, Alberta, Colorado, Minnesota, South Dakota, Nebraska, Utah, Saskatchewan, Los Angeles, San Francisco •Invite-A-Friend to Golf •Invite-A-Friend to Camp •Invite-A-Friend to Fish	•Spring/Summer Magazine Ads •Summer TV Ads-Washington, Alberta, Colorado, Minnesota, South Dakota Nebraska, Utah, Saskatchewan, Los Angeles, San Francisco •Invite-A-Friend to Golf •Invite-A-Friend to Camp •Invite-A-Friend to Fish	•Fall Magazine Ads
Trade Advertising & Promotions	•Fam Office Ad •Media Direct Mail - Summer Calendar of Events •Tour Operator Direct Mail- Montana Magazine	•Fam Office Ads •Tour Operator Direct Mail- Tour Kit •Summer Magazine Ad	•Fam Office Ads •Summer Press Kit Direct Mail •Publicity Newsletter Direct Mail-Summer •Tour Operator Direct Mail- Montana Magazine	•Fam Office Ad	•Fam Office Ads •Tour Operator Direct Mail- Montana Magazine •Tour Operator Direct Mail- Tour Kit	•Fam Office Ad •Publicity Newsletter Direct Mail- Fall
Familiarization Tours		•U.S. Travel Agents Ski Fam-Delta Air Lines •U.K. Winter Trade Fam	•U.S. Travel Agents Ski Fam-Northwest Airlines		•German Trade Fam	
Tourism Events & Projects	•Network Group Travel Work Shop		•Tourism Advisory Council Meeting (7) •Governor's Conference on Tourism & Recreation (8-9)			•Tourism Advisory Council Meeting (14-15)
Sales & Trade Missions	•Group Travel Sales Calls Dallas		•U.K. Trade Mission (12-21)	•Hwy 89 Trade Mission-Japan •Germany Trade Mission		
Trade Shows	•Travel Trade Show New York (5-7) •Discover Travel Show Toronto (14-16)		•Canadian Expo Sports Show (2-4) •IR Boat Show (7-9)	•National Tour Association (NTA) Sports Exchange Rendezvous Atlanta (20-23)	•Pow Wow Travel Trade	
Consumer Travel Shows	•Anaheim Sports & RV Show (2-10) •To Ro Sports Show Denver (13-17) •To Ro Sports Show Seattle (27-31)		•Northwest Sportshow-Minneapolis (March 26-April 4)			
Publications	•Calendar of Events •Fish Montana •Ski Montana Guide •Travel Planner •Montana Magazine	•Highway Map •Montana Travel Planner	•Summer Calendar of Events	•Montana Travel Planner		•Montana Travel Planner

Tourism Research

Planned Research Projects

The overall purpose of the planned research is to allow the recreation and tourism industry to make informed decisions about their industry's economic impact, development, planning and marketing. The information generated from the research is designed to be relevant, practical and timely. Listed below are the research projects being conducted by the Institute for Tourism & Recreation Research (ITRR), funded by the Montana lodging tax.

Travel research currently approved by the Tourism Advisory Council:

Assessment of the Economic Benefits of Snowmobiling

This project will replicate research conducted during the 1987/88 winter season. In that study, nonresidents visiting major centers of snowmobiling activity were sampled at their place of lodging. The sample was then sent a mail-return questionnaire in which respondents listed their reasons for snowmobiling in Montana, preferences for facilities and recreation opportunities, and expenditures during the visit.

Wage & Salary Levels of Tourism Industry Employees

The purpose of the project is to determine wage and salary levels of individuals employed in Montana's tourism and recreation industry, and to assess proprietor income for manager-owned businesses. The project will include two components: 1) a survey of wage and salary levels in principal tourism-dependent businesses, and 2) an assessment of wage and salary levels for appropriate positions advertised, if available, through the Department of Employment Security.

Economic Benefits of Nonresident Travel in Montana

The overall goal of this study is to update the previous (1988/89) comprehensive study of nonresident travel in Montana. A related goal is to develop and implement a process to monitor economic impacts on a yearly basis. People entering Montana by highway and air will be intercepted, and requested to participate in the study by completing a mail return diary-questionnaire. The result will be statewide and regional (tourism country) estimated of direct, indirect and induced effects (gross industrial output, labor income and employment) due to nonresident travel spending. The project will also produce quarterly visitor profiles for both highway and air travellers that can be used to compare with 1988/89 results. The project will be conducted over two fiscal years. Sampling will begin in January 1994, and continue for a year.

Motorcoach Economic Impact

This study will reexamine the motorcoach industry in Montana and include charter groups, as well as scheduled group tours. The study will involve bus and tour companies; no primary data collection would be involved.

California Marketing Study

This study, conducted by a private consultant, will more completely assess the potential of the California market. The project will be conducted through a telephone interview of California households and vacation planners.

State Parks Tourism Enhancement

The goal of this research is to gather information the Parks Division of the Montana Department of Fish, Wildlife and Parks can use to develop model marketing programs for three units of the state park system: Flathead Lake, Lewis and Clark Caverns and Makoshika. The project will involve an inventory of park attributes, a list of services and opportunities needing enhancement and a marketing plan.

Travel Research Library

The Travel Montana Research Library has been established as resource for the staff and Montana tourism industry. The research is used to make informed marketing decisions, plan for future development, as well as to gauge the travel industry's economic impact in Montana.

Studies in the library have been gathered from sources such as the Institute for Tourism & Recreation Research, U.S. Travel & Tourism Administration, Tourism Canada, U.S. Forest Service and the National Park Service. The library is updated on an ongoing basis, but is not a complete source of research. The following topics are included in the library:

Research About Montana:

Conversion Studies

Includes studies which have been done for Travel Montana to measure the effectiveness of various campaigns, such as the Montana/Alberta campaign and the spring television advertising campaign.

Marketing Research

Includes marketing research reports and development plans.

City/County/Regional Studies

Some localized studies from around the state are available.

General Research and Information

Includes economic impact studies, travel surveys, tourism statistics.

Other Research:

Canadian Travel

Includes reports on destinations visited and expenditures in the U.S. by Canadians, Canadian tourism market research, etc.

Economics - Not Travel Related

Some Montana economic research not related to travel is also available.

International Research and Information

Primarily reports from the U.S. Travel & Tourism Administration related to international travel to the U.S.

National Research and Information

Economic impact, travel trends and marketing reports on travel within the U.S.

National and State Parks Research and Information

Travel trends, visitor studies, impact studies, etc.

Travel Research and Information From Other States

Travel and tourism studies conducted by states other than Montana.

Outdoor Recreation Research

Studies regarding the economic value and impact of outdoor recreation activities such as fishing, whitewater boating, outfitting, off-highway vehicles, etc.

Public Lands - Forest Service and Wilderness Areas

Visitor studies, environmental impact statements, etc.

Tourism Development

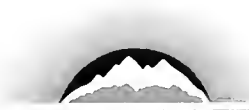
Information regarding what other states and provinces are doing in the area of tourism development.

Winter Research and Information

Research on skiing, snowmobiling, cross-country skiing, etc.

This research is available to members of the Montana tourism industry. Travel Montana can provide information to interested parties about how to obtain duplicate copies of any materials in the library. A catalog of the studies may be obtained by contacting Debbie Hanna at Travel Montana.

Tourism Facts & Figures



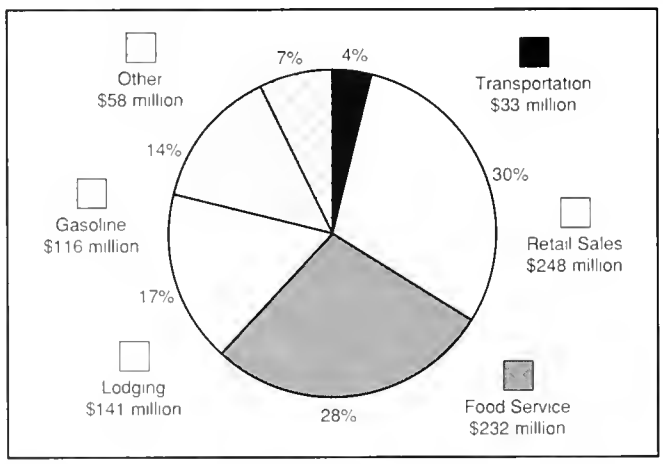
How the Travel Dollar Impacts Montana's Economy

When a traveller to Montana makes a purchase, the impact of the dollar does not stop there. Instead, the purchase stimulates secondary transactions in the economy. Each time a transaction is made, additional impact results from income being generated and re-allocated, and labor employed. Determining the linkages of all transactions made gives an indication of the total economic impact to Montana.

Direct impacts are the initial value of the goods and services purchased by travellers. *Indirect* impacts occur when businesses purchase goods and services for operating needs. These purchases generate additional output or sales indirectly. Those supplying businesses must, in turn, purchase goods and services from their suppliers. This chain of transactions continues until the initial purchase totally "leaks out" of the region through imports and taxes. *Induced* impacts are the result of the increased earnings of employees in the supplying businesses. The sum of the indirect and induced impacts comprises the *secondary* impacts. *Total* economic impacts are the sum of direct and secondary impacts. The ratio of direct impacts to total impacts is referred to as an *impact multiplier.*

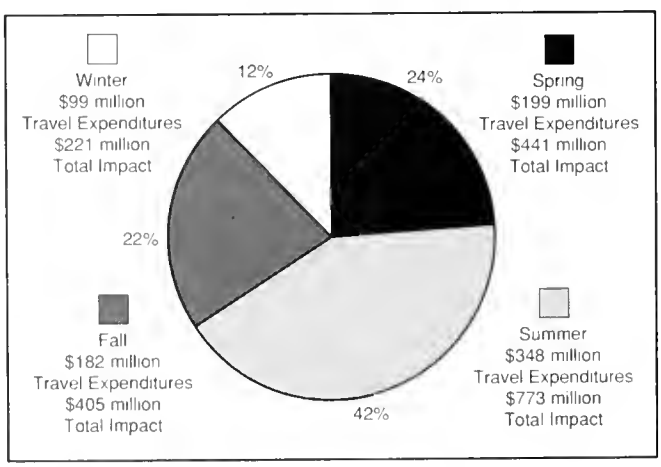
-1991 Figures-

How the Nonresident Travel Dollar is Spent



Total Gross Expenditures $828 million

Travel Expenditures and Total Economic Impact Generated by Season



Total Expenditures $828 million
Total Economic Impact- $1.840 billion
(Includes Direct, Indirect and Induced Impacts)

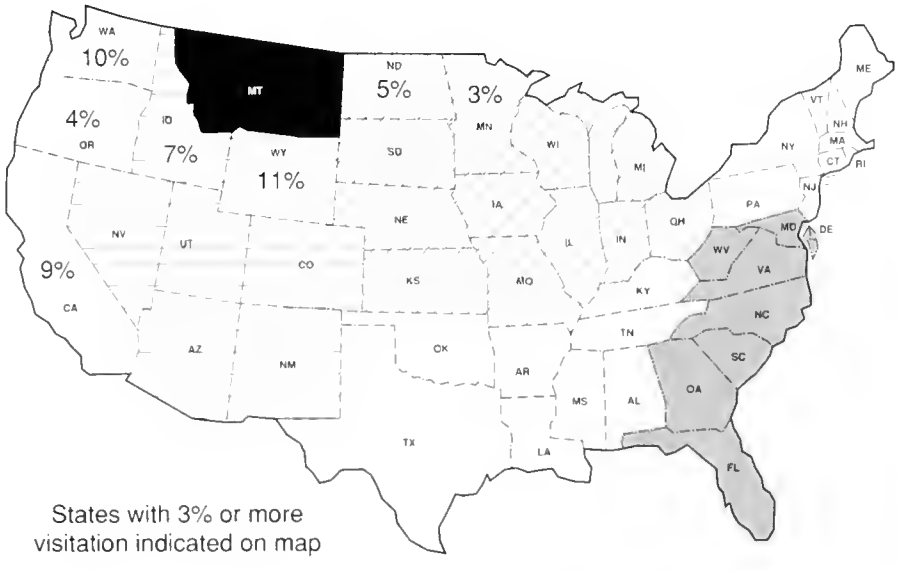
Economic Impact of Nonresident Travel

Economic Impact (1991 estimates)	Direct Impact	Secondary Impact	Total Impact
Total Expenditures	$ 828 million	Not Applicable	Not Applicable
Total Gross Output	$ 757 million	$ 1.083 billion	$ 1.840 billion
Employment Compensation *(Travel generated salary and wages)*	$ 202 million	$ 267 million	$ 469 million
Employment	**16,200 jobs**	**13,100 jobs**	**29,300 jobs**

Number of Nonresident Visitors (1991)

Traveller Type	Traveller Groups	Number of Travellers
Highway	2,130,000	5,501,000
Airport	244,000	478,000
Total	**2,374,000**	**5,979,000**

State and Region of Visitors to Montana*

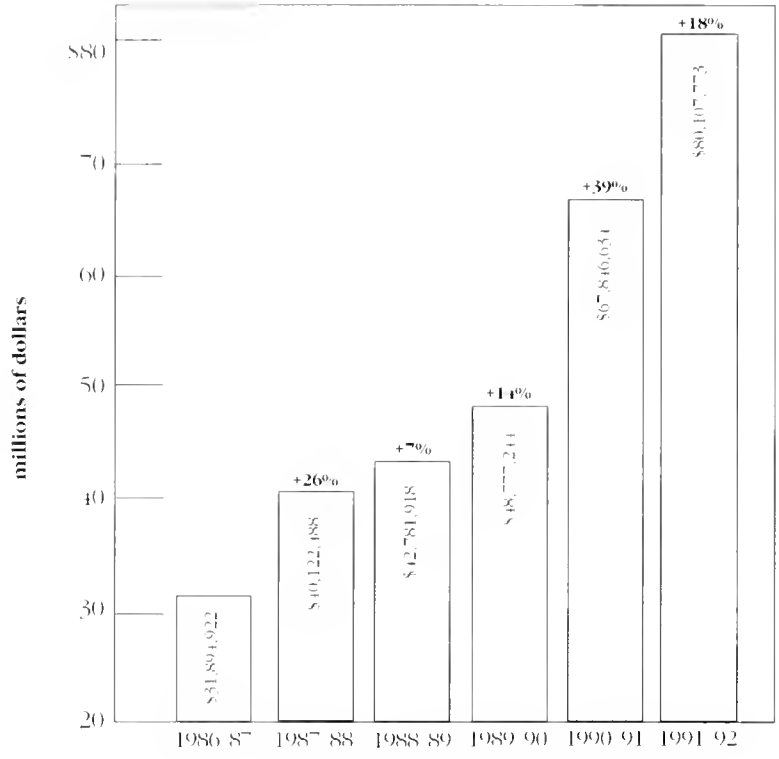


States with 3% or more visitation indicated on map

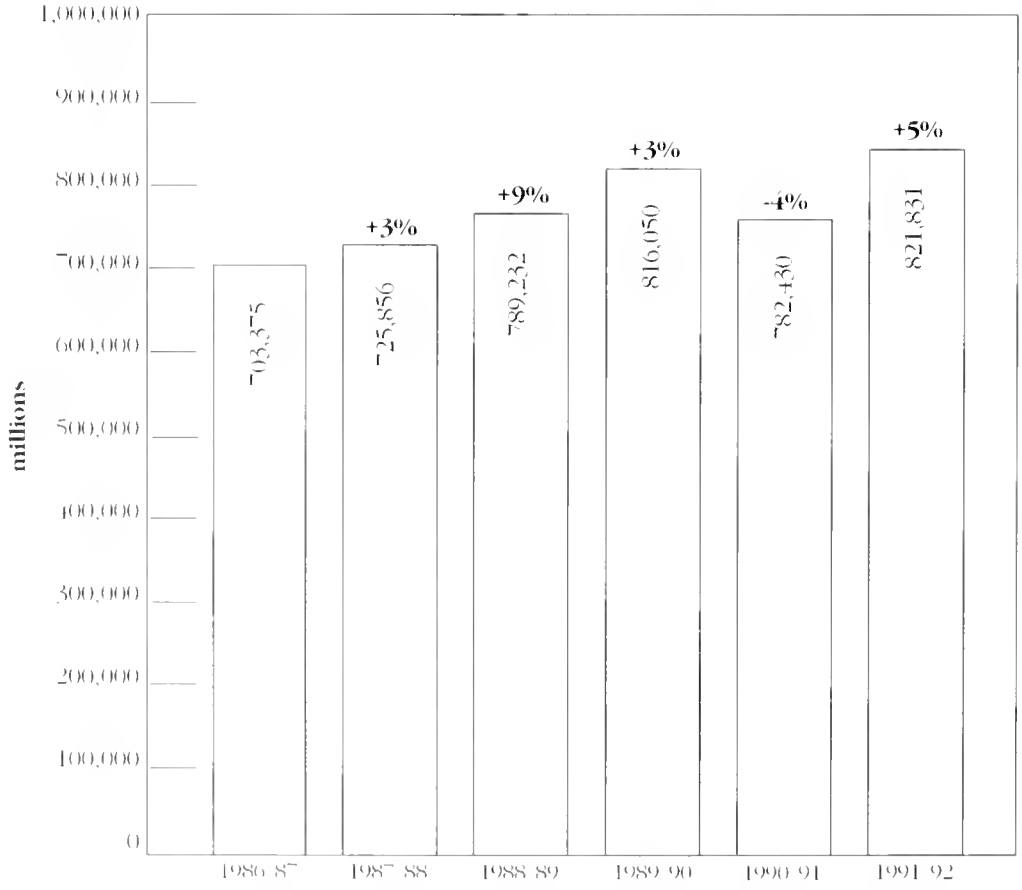
Canada	19%	Pacific	23%	South	6%
Alberta	10%	Mountain	16%	S. Atlantic	8%
B.C.	5%	N. Central	18%	Northeast	7%
Other Prov.	4%				
Other Countries	2%				

*Reflects only spring and summer 1990. Totals may not add to 100% due to rounding.

Total Skier Revenue

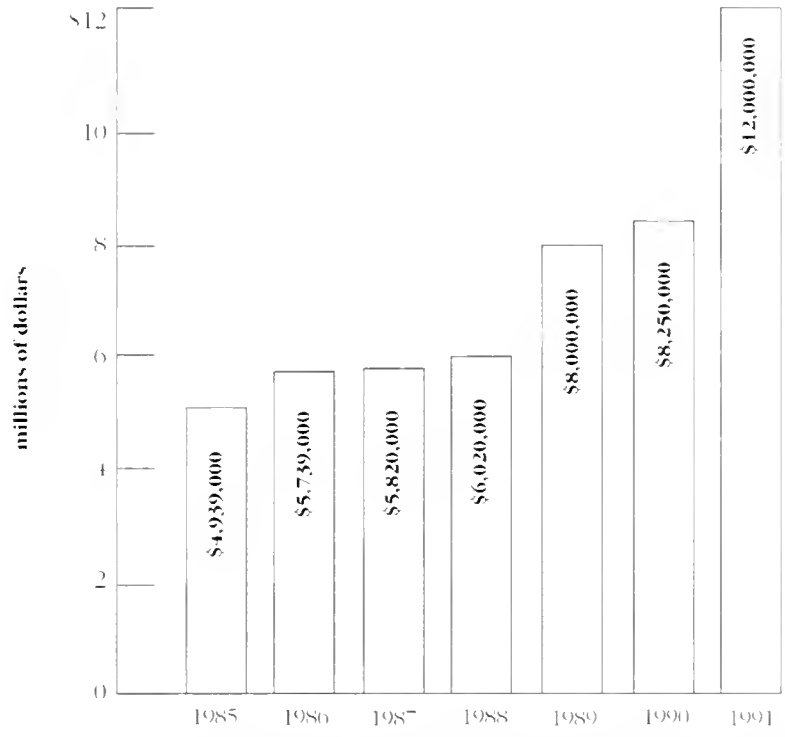


Total Skier Days



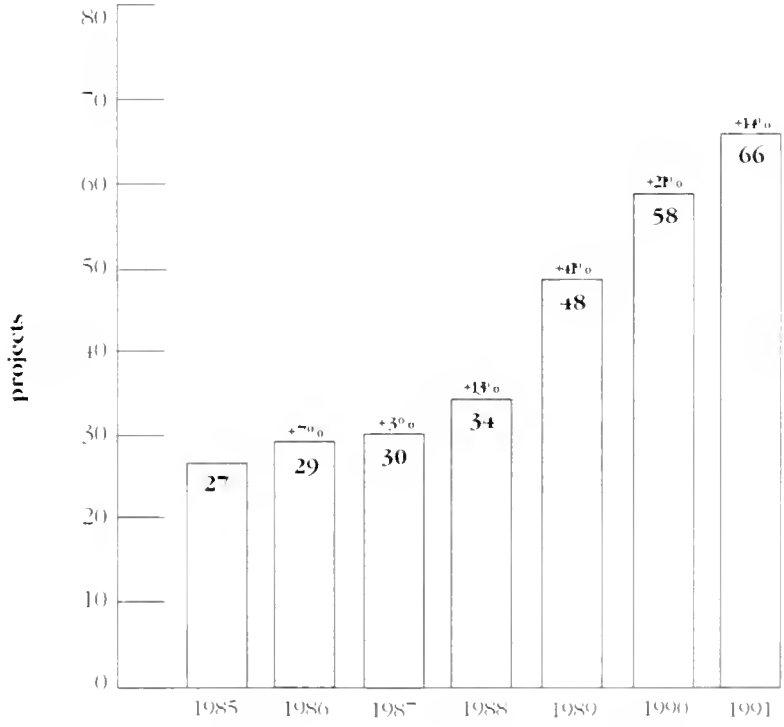
Montana Revenue From Filming

(by year*)



* Reflects only expenditures directly related to production costs, excludes personal expenditures by actors and crew members

Montana Film Projects Per Year



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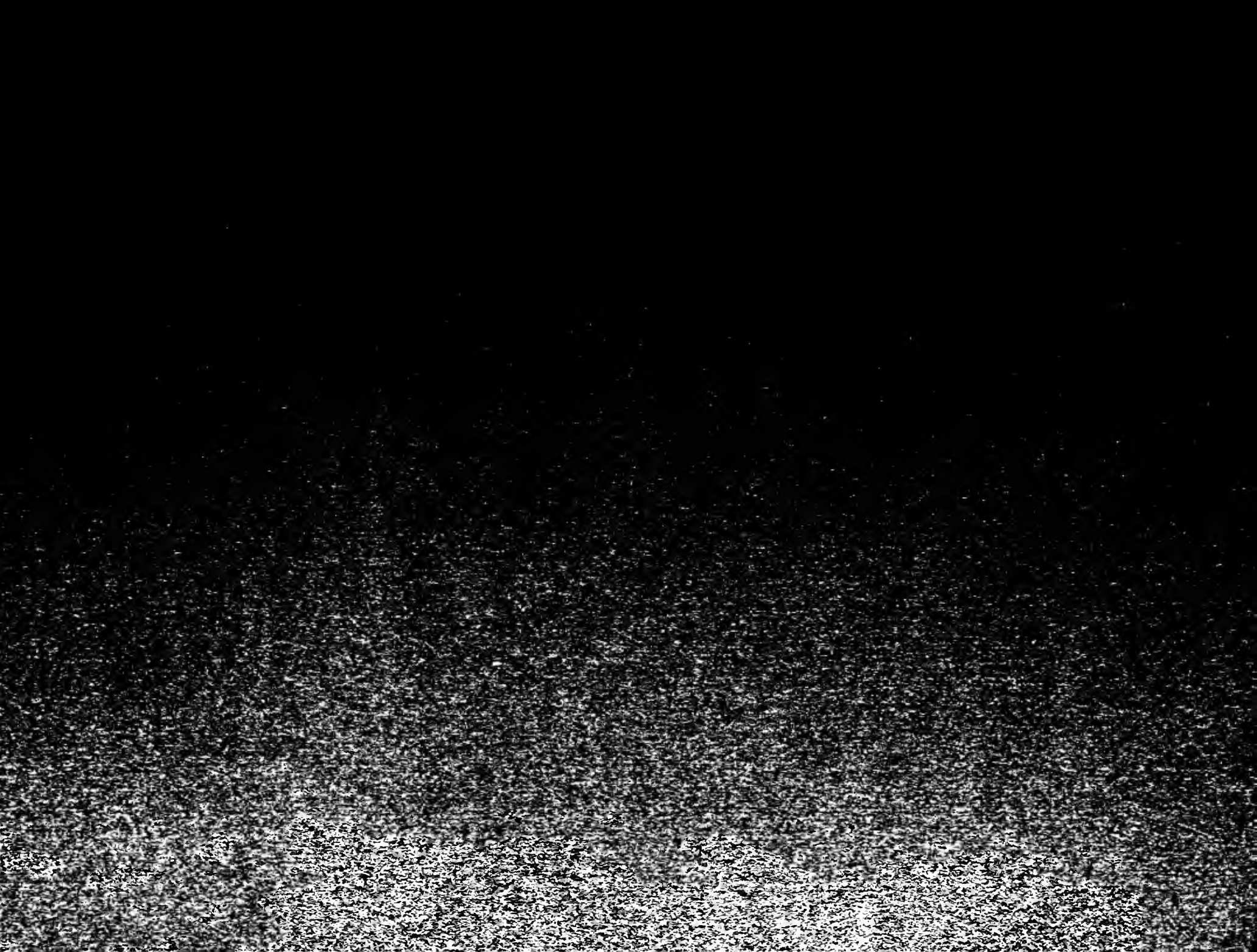
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